PeopleSoft®

Release Notes for PeopleSoft Enterprise HRMS 8.9

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Contents

Release Notes for PeopleSoft Enterprise HRMS 8.9 Preface

This document provides an overview of the value proposition that is associated with the new features and enhancements provided by PeopleSoft Enterprise HRMS 8.9. It is a roadmap that is intended to help you assess the business benefits of PeopleSoft Enterprise HRMS 8.9 and to plan your information technology (IT) projects and investments.

The new features and enhancements that are included in this release are grouped according to business process to better demonstrate how PeopleSoft solutions help you optimize your business processes. Our goal is to ensure that you leverage technology to its fullest to increase the efficiency and effectiveness of your operations.

This preface discusses:

- PeopleSoft release information publications.
- Additional resources.

Note. Use the index to locate the section for each application in the release notes.

PeopleSoft Release Information Publications

This section discusses four publications that provide in-depth technical and functional information that is available at the time of publication:

- Statement of direction
- Release value proposition
- Prerelease notes
- Release notes

Statement of Direction

The statement of direction is published 9 to 12 months before a release. It provides a high-level overview of the major focus of product development efforts, enabling high-level business decision makers to begin preliminary upgrade planning.

Release Value Proposition

The release value proposition provides more functional details than the statement of direction, identifies major enhancements, and articulates the expected business benefit. This document is designed to help you to determine whether new product features might warrant upgrading from an old release or embarking on a new PeopleSoft implementation. With this information, managers can initiate preliminary budget planning and begin putting together a project team to further evaluate specific PeopleSoft products. The release value proposition is published 6 to 9 months before a release.

Prerelease Notes

Prerelease notes provide more functional and technical details than the release value proposition. This document describes how each enhancement functions within the context of the greater business process. This added level of detail should enable project teams to answer the following questions:

- What out-of-the-box functionality will change?
- What customizations may be affected?
- How will an upgrade or new implementation affect other systems?
- How will these changes affect the organization?

After the project team has reviewed and analyzed the prerelease notes, business decision makers should be in the position to determine whether to allocate budget and initiate implementation plans.

Prerelease notes are published approximately 3 months before a release.

Release Notes

Release notes are published at GA and validate the final scope of the release. The release notes discuss the features and enhancements that are available with the GA release of each product, describing the finalized functional and technical details that enable project teams to confirm budgets and complete implementation plans.

Additional Resources

There are many additional resources to help your organization determine the effects of upgrading to this release.

Visit the PeopleSoft Customer Connection website frequently to keep apprised of ongoing changes.

This table lists the types of resources that are available on Customer Connection:

Resource	Navigation
Upgrade paths	Support, Roadmaps + Schedules, Release Definitions
Training opportunities	Education Services
PeopleSoft Consulting (PSC) readiness	Assess Your Needs

PeopleSoft Enterprise HRMS 8.9 Value Proposition

This document provides an overview of the new features and enhancements that are planned for PeopleSoft Enterprise Human Resources Management System (HRMS) 8.9. It is a roadmap intended to help you assess the business benefits of HRMS 8.9 and plan your IT projects and investments.

This document is only a preliminary version and is not subject to your license agreement or any other agreement with PeopleSoft. It contains intended developments and functionalities and is not meant to be binding on PeopleSoft to any particular course of business, product strategy, or development. Please note that this document is subject to change by PeopleSoft at any time without notice.

Throughout this document, you will find examples of PeopleSoft ingenuity at work. In each section of this document, you will find detailed descriptions of the new features, functions, and products provided in HRMS 8.9, along with business benefits that our customers can achieve. We've organized this document according to the four main Human Capital Management (HCM) business processes with a special introduction to HRMS 8.9 overall, including our special focus on the Total Ownership Experience.

Review the table of contents to find the topics that interest you most. There, you will see that the document is divided into clearly delineated, product-related sections under each of the four business processes:

- Plan, Attract, Onboard
- Assess, Design, Develop
- Optimize, Track, Monitor
- Plan, Incent, Reward

PeopleSoft Enterprise HRMS 8.9

If you want an edge in a fast-changing business environment, look to your workforce. Find better ways to develop and deploy talent. Manage your people as mission-critical assets that can help you achieve higher levels of operating performance. When our customers asked for new strategies that could add value to traditional human resources management processes, we listened. Today, we continue to deliver on the promise of human capital management as a new way of doing business in which every employee—from the boardroom to the storeroom—contributes to business performance.

Human capital management, a business discipline powered by PeopleSoft's 17 years of HR best practice leadership, is the only enterprise-wide strategy for unlocking the full value of your workforce. Your people determine the success of everything your organization does—from serving customers to running an efficient supply chain. PeopleSoft Enterprise HRMS enables you to put the right people in the right jobs, develop and reward top performers, retain key talent for the long term, and increase efficiency and operating performance throughout your organization. With HRMS, you can turn every employee into a competitive asset.

HRMS 8.9 is PeopleSoft's newest solution suite, providing the foundation for effective human capital management around the world. HRMS applications promote a rapid return on investment—through reduced operational costs and increased efficiency—by connecting people to delivered business processes, automating common administrative tasks, and leveraging industry best practices. PeopleSoft offers the most technically advanced, comprehensive, and cost-effective human resources management product suite on the market today. This suite is built on a uniform, internet-based technology platform and delivers innovative functionality and embedded analytics. PeopleSoft is the acknowledged world leader in human resources management solutions, with 73 of the top 100 companies on the Fortune 500 list using our software.

Total Ownership Experience

No one has used technology to address the people-intensive processes of owning enterprise software—until now. In 2003, PeopleSoft management made a commitment to address our customers' total cost of owning PeopleSoft applications. PeopleSoft is making installations and implementations faster, simplifying upgrades, offering real-time support and performance diagnostics, and delivering robust integration with other eBusiness software. This initiative, which quantifiably addresses reduction in implementation cost, usability, and supportability improvements, is called the Total Ownership Experience. PeopleSoft Total Ownership Experience transforms the way you implement, maintain, and use enterprise software. Your results? Faster implementation. Greater end user productivity. Increased IT effectiveness. And a greater return from your software investment. In HRMS 8.9, you will find new functionality and enhancements that deliver on the promise of the Total Ownership Experience.

Even before PeopleSoft started on this initiative, we were already leaders in improving the enterprise application lifecycle. As a result, much of the groundwork for the Total Ownership Experience has already been laid, and it is yielding positive results. In fact, according to two different industry analysts, we are delivering value ahead of our competitors:

PeopleSoft outperforms SAP and Oracle in total cost of ownership—we are 51 percent lower than SAP and 25 percent lower than Oracle (Deriving Value from Twenty-First Century ERP Applications, META Group Inc., 2003).

PeopleSoft continues to raise the bar with the goal of improving implementations, operations, upgrades, and usability of enterprise applications by applying technology to improve all aspects of the customer experience. This initiative addresses all aspects of the enterprise application lifecycle.

PeopleSoft is investing in installation, configuration, and integration to dramatically reduce implementation time and costs. Like all PeopleSoft applications, PeopleSoft Enterprise HRMS 8.9 and PeopleTools 8.45 have a strong development focus on delivering the best Total Ownership Experience in the industry. New technology further automates support, increases quality, and streamlines upgrades to increase availability and decrease operational costs. Our continued investment in application usability will further increase user productivity and effectiveness.

Implementation

According to analysts, labor makes up 65 percent of the total project cost for an average ERP implementation.

PeopleSoft Total Ownership Experience automates the people-intensive process of installing, configuring, and integrating software. PeopleSoft continually improves installation, configuration, and integration to dramatically reduce implementation time and costs. With HRMS 8.9 and PeopleTools 8.45, we are accomplishing this goal by making significant enhancements.

Process Improvements

- Improved installation documentation and training and delivery of new utilities designed to make the installation process easier and faster.
- New implementation wizards and templates designed to lead you through software setup and configuration management.
- Out-of-the-box multi-vendor business process integration.
- More than 200 component interfaces delivered to load high-volume reference tables.

Results

- PC-like installation with PeopleSoft Express Install—reduction in upgrade installation time.
- Faster to configure —step-by-step implementation wizard (Setup Manager).
- Connector technology for SAP and Oracle to reduce integration time.
- Reduction in complexity and time to load data into critical application tables.

Usability

HRMS 8.9 with PeopleTools 8.45 technology delivers on the Total Ownership Experience by enhancing usability across the product suite. It reduces the time and number of clicks needed for key processes, establishes industry leadership in task completion rates, and makes marked improvements in the usability of key functions throughout the HRMS suite. We achieved these milestones by doubling our investment in our usability team and increasing customer participation in validating the usability of the application.

- We are conducting usability tests for all top transactions in PeopleSoft Enterprise Benefits Administration, eCompensation, ePay, eRecruit, Time and Labor, and Payroll for North America.
- The key metrics we are monitoring include task completion rates and click counts.
- Specific usability enhancements across the applications include better titles, section headings, color separations, and a new portal-style interface for recruiters called the Recruiter Console.
- We now conduct performance and functional testing by using real customer data.

Results

- Higher productivity and decreased training costs.
- Less time and fewer clicks required for key processes.
- Recruiter Console and Applicant Console.
- Functional area navigation pages.
- Better performance and scalable applications.

Supportability

HRMS 8.9 and PeopleTools 8.45 incorporate extensive improvements in the areas of supportability, performance, and upgrades. PeopleSoft now offers three new system-aware diagnostic and support tools as part of the PeopleTools 8.44 Total Ownership Experience release, including Change Assistant, Performance Monitor, and Diagnostic Framework. These tools are designed to automate your software update process and to streamline your application performance and issue diagnostics. Together, these tools enable you to decrease the amount of time your IT staff spends maintaining your PeopleSoft applications. In turn, this helps you to reduce your overall total cost of ownership.

Process Improvements

- Diagnostic and troubleshooting improvements that reduce customer time spent on calls and enable faster case resolution.
- Embedded diagnostic scripts as well as single-click maintenance loads.
- Automated diagnostics for continuous performance optimization.
- Reduced number of service packs and improved utilities to reduce upgrade time.
- Quarterly Fix Packs now available to facilitate application of patches and updates.

- Upgrade paths that are volume tested with real customer data.
- New performance quality benchmarks that ensure that no software is shipped with outstanding performance incidents.

Results

- Automatic detection and delivery of software updates and patches (Change Assistant).
- Performance monitoring tools packaged with PeopleTools to allow instrument-level tuning.
- Major reduction in upgrade downtime.
- Reduction in performance incidents, as well as application performance benchmarks available at general availability.

Total Ownership Experience Summary

Across PeopleSoft, more than 2,700 employees are focused on Total Ownership Experience initiatives. Success measurements and management by objectives are directly tied to 25 planned releases, 684 separate projects, and 115 identified line items. In all, we will spend more than $800 million to ensure that these directives remain our primary focus and that we can consistently deliver on the promise of Total Ownership Experience for our customers. In fact, PeopleSoft customers are already showing measurable results from using PeopleSoft 8.8 applications with Total Ownership Experience enhancements. They can now implement, use, and maintain their PeopleSoft applications more quickly and easily, increasing user value and lowering their overall total cost of ownership.

PricewaterhouseCoopers

This global professional services firm has completed the smoothest software upgrade in its history. PricewaterhouseCoopers (PwC), a global professional services firm, upgraded to HCM 8.8 (Service Pack 1) from PeopleSoft 7.5, extending its PeopleSoft HR system and delivering employee self-service to 25,000 staff and retirees in the United States. PwC initially implemented an upgrade to PeopleSoft Enterprise Human Resources, successfully adding an upgrade to PeopleSoft Enterprise Payroll just three and a half months before the system went live. The company is moving toward a single instance of HCM across its worldwide operations.

- Implementation was faster and less expensive than expected, with the upgrade to 8.8 taking half the time it took for 7.5 and costing just one-sixth as much.
- Design, code, and testing for the upgrade to 8.8 took one-tenth the hours and one-tenth the staff it took for 7.5, allowing PwC to reduce configuration staff from 20 people to eight working part-time on the project.
- Streamlined HR and payroll processing is saving the company about $7 million.

- The company accelerated overnight payroll processing from 17 hours to four—an 80 percent reduction.
- The company decreased full-time employees working on maintenance from seven to three and reduced overall IT support by seven percent.
- The implementation was not disruptive to end users.

Remy Corporation

This rapidly growing staffing company has achieved a 50 percent increase in user productivity for front-office staffing professionals. Remy Corporation, a leader in integrated staffing, recruiting, and consulting solutions, has experienced rapid success and growth over the past three years, presenting a major challenge to its business and technical infrastructure. The crucial need was to find software that would allow Remy to easily support, use, and manage an ever-growing amount of information.

- The ease of upgrade to PeopleSoft 8.8 reduced Remy's upgrade budget from $250,000 to $184,000, a 26 percent savings.
- The quality of the testing process, the upgrade scripts, and the PeopleSoft Upgrade Assistant contributed to a hassle-free implementation.
- Remy required only two testing steps before putting the software into production.
- The total upgrade effort took about three weeks, and the upgrade had minimal impact on end users.

Regional Municipality of Durham

This regional government municipality in Ontario, Canada, has reduced training by 40 percent. The Regional Municipality of Durham sought to improve cross-agency financial management and collaboration while containing IT costs. The municipality is upgrading from PeopleSoft 7.5 to PeopleSoft Enterprise Financial Management 8.8 and HRMS 8.8.

- The upgrade was implemented on schedule and within budget.

  The municipality reduced person-hours spent on the upgrade process by 15 percent, compared to the previous upgrade.
- The municipality configured its HRMS application in 72 hours, with little manual configuration and minimal disruption to end users.
- The municipality implemented a demo and system environment in three days, compared with two weeks for other software.

Plan, Attract, Onboard Enhancements

The first business process in the employee life cycle is Plan, Attract, Onboard. This process is as critical to the workforce as raw materials are to a manufacturing assembly line. Our definition of this business process includes planning the workforce you need, attracting the best candidates, onboarding them efficiently, and providing the tools that new hires need to work effectively from day one. This process includes the procurement of service or contract labor.

What's New in PeopleSoft Enterprise Recruiting Solutions 8.9?

PeopleSoft Enterprise HRMS 8.9 is a major release for Recruiting Solutions and is the fourth generation of the product since its initial release in 2000. We have invested heavily in technical and functional product enhancements. These changes are primarily motivated by customer requests, with additional feedback coming from domain experts.

Recruiting Solutions 8.9 has five key themes:

- New packaging.
- Enhanced applicant experience.
- Enhanced usability.
- Enhanced integration.
- Additional core features.

New Packaging

As part of Recruiting Solutions 8.9, we are making major changes to the data model and organizing products into components, as well as merging and enhancing functionality. These changes lead to a cleaner design and allow a much more efficient development and upgrade process as we continue to enhance the product suite.

We are merging PeopleSoft Enterprise Human Resources: Recruit Workforce and PeopleSoft Enterprise eRecruit Manager Desktop. This combined product is called Talent Acquisition Manager. PeopleSoft Enterprise eRecruit is changing to Candidate Gateway to more clearly communicate that product as the access point for applicants to interact with the system.

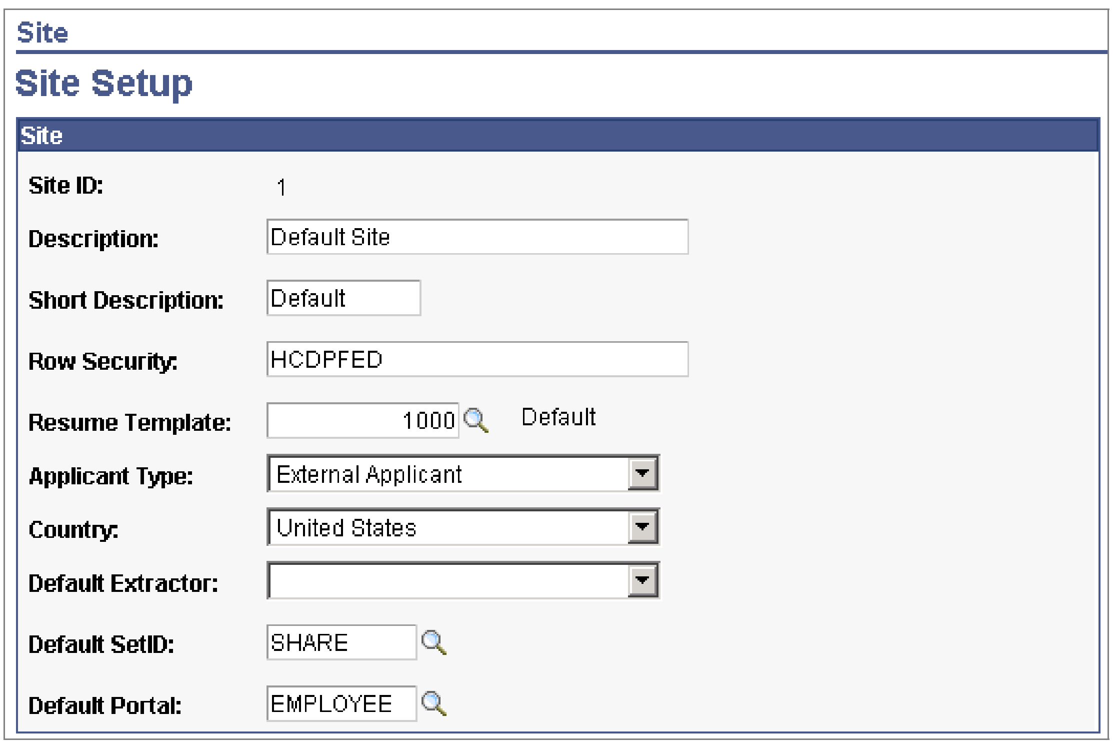
Enhanced Applicant Experience

Seeking applicants online is becoming standard practice for most companies. Candidate Gateway was designed for the applicant experience. In Recruiting Solutions 8.9, we are enhancing the entire process and general usability for applicants.

Configuration of Online Application Sites

Candidate Gateway enables organizations to manage the look and feel of the application for each of their career sites by creating a site ID for each site. Site IDs define the details of a Recruiting Solutions online application site, including the jobs that applicants can access through the site. You can control the job openings that applicants have access to by associating a row security permission list to each site. Sites also enable organizations to include additional content that is not job-related, for example, the company's benefit or company culture information.

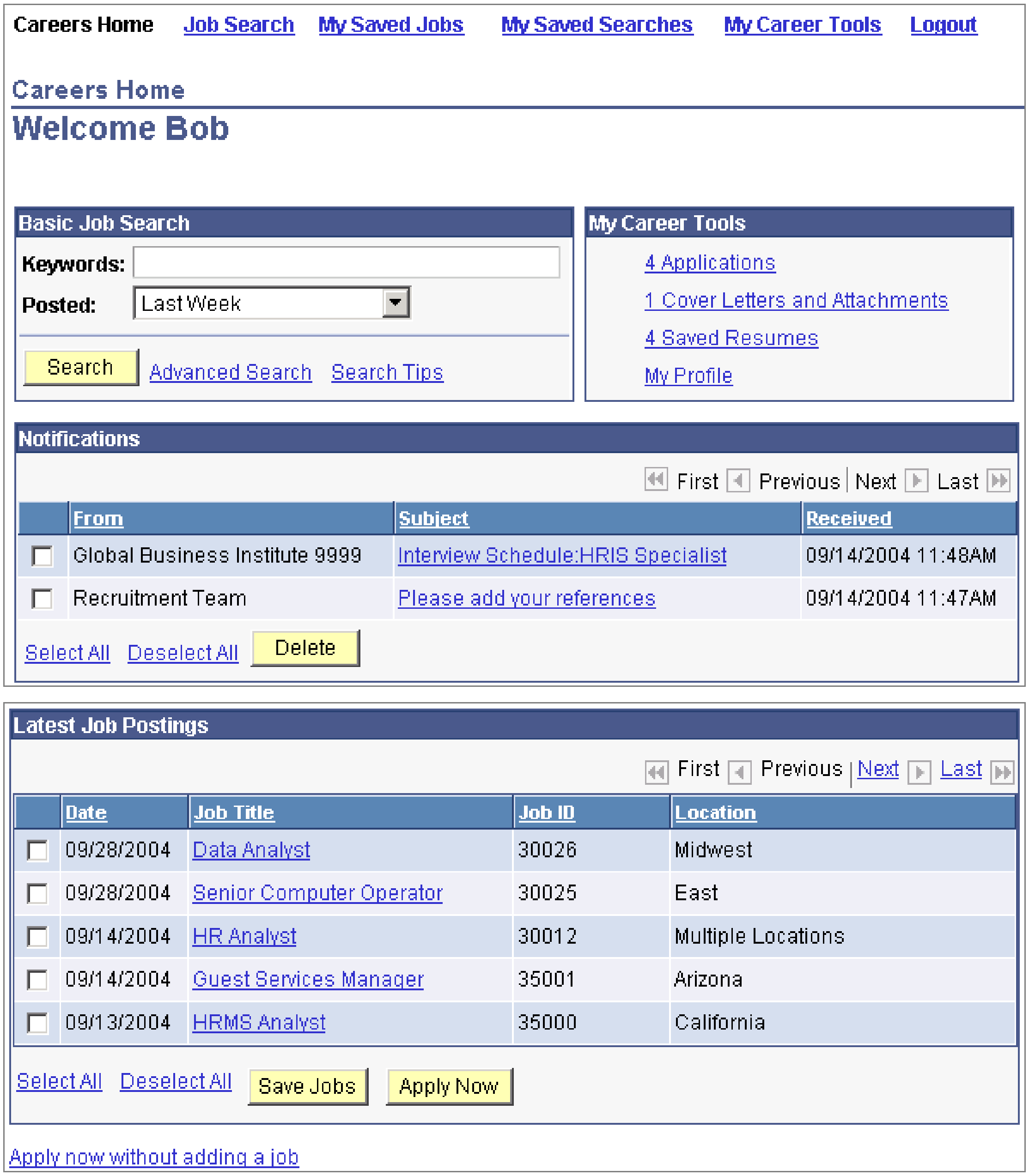
You can set up an unlimited number of sites for an organization. For example, an organization can have a unique site for each business unit in the organization, and applicants accessing those sites can have access to job openings for each specific business unit. Sites are either for internal applicants that are employees, internal applicants that are nonemployees, or external applicants. You can also utilize the text catalog to target different audiences. For example, you can have different text on the pages for internal and external applicants.



Defining online application sites

Enhancements to General Usability

The Careers Home page is the access point to all recruiting tasks that applicants need to perform. From this page, applicants can search for jobs, view notifications regarding interview schedules and requests for references, view the latest job postings, and view a snapshot of the number of applications, attachments, and resumes that they have submitted.

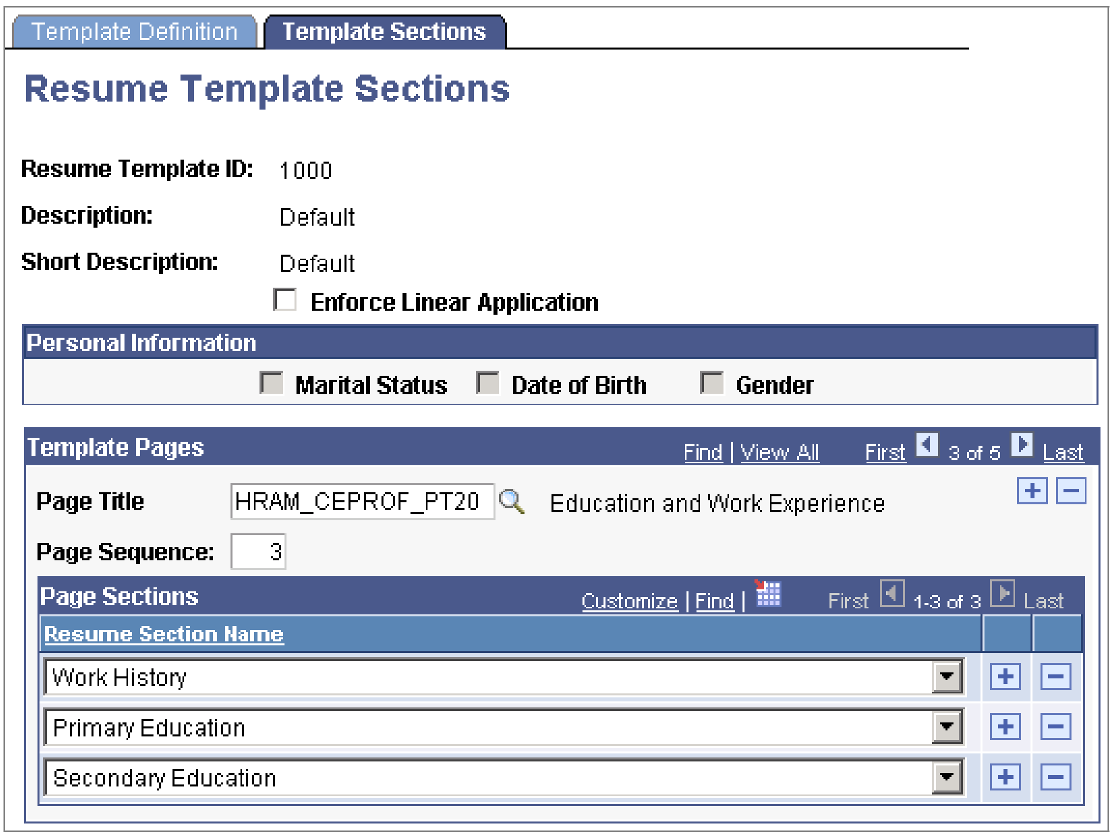


Careers Home page

Simplified Application Process

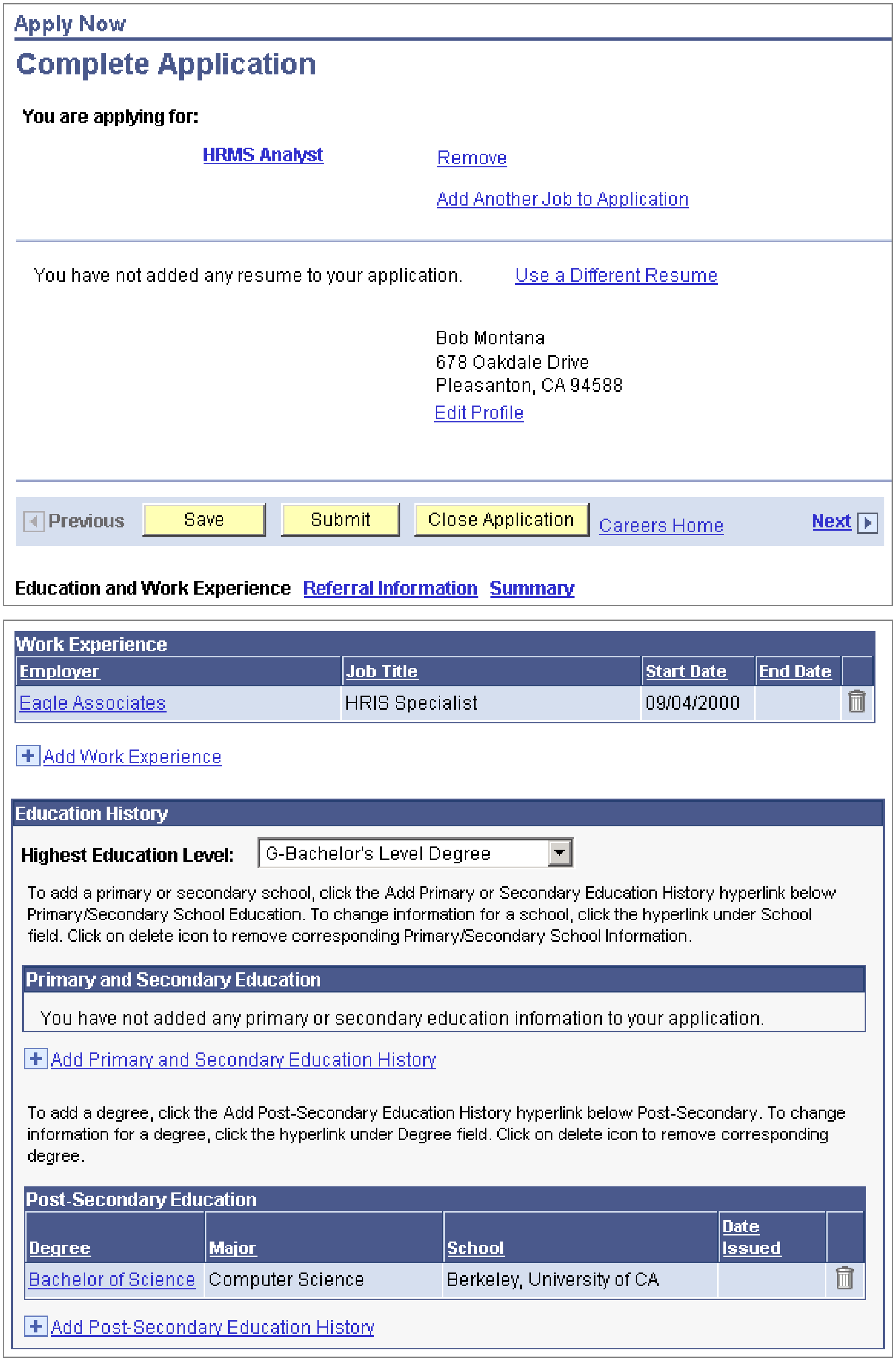
Recruiting Solutions 8.9 no longer uses the wizard-driven approach. Instead, we allow customers to define the information that they want to collect and how many steps they want to have applicants go through to present that information. Customers have the flexibility to choose a single-page application or multiple pages, depending on their business requirements.

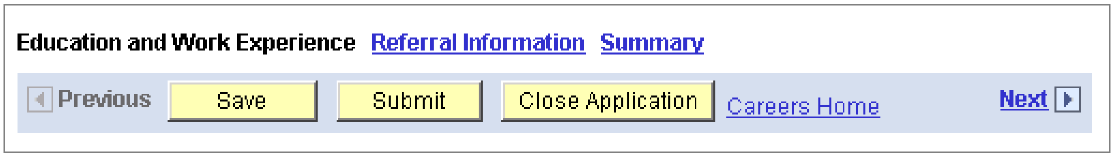
Just as before, you use the resume template to design your application. Resume templates define the pages that appear to an employee or external applicant when they apply for jobs online, the name of each page, the order in which each page appears, and the sections that appear on each page. For example, you can create a page called Education and Work Experience, and add sections to that page that enable applicants to enter education and work experience information.



Specifying pages and sections on a page for a resume template

The resume template determines the way in which information appears to applicants. Pages that you create for a resume template appear as links on the Apply Now - Complete Application page. Applicants click these page links to access each page. Sections that you define for each page of a resume template appear as group boxes on each page.


Apply Now
Complete Application
You are applying for:
HRMS Analyst
Remove
Add Another Job to Application
You have not added any resume to your application.
Use a Different Resume
Bob Montana
678 Oakdale Drive
Pleasanton, CA 94588
Edit Profile
Previous
Save
Submit
Close Application
Careers Home
Next
Education and Work Experience
Referral Information
Summary
Work Experience
Employer
Job Title
Start Date
End Date
Eagle Associates
HRIS Specialist
09/04/2000
Add Work Experience
Education History
Highest Education Level:
G-Bachelor's Level Degree
To add a primary or secondary school, click the Add Primary or Secondary Education History hyperlink below Primary/Secondary School Education. To change information for a school, click the hyperlink under School field. Click on delete icon to remove corresponding Primary/Secondary School Information.
Primary and Secondary Education
You have not added any primary or secondary education information to your application.
Add Primary and Secondary Education History
To add a degree, click the Add Post-Secondary Education History hyperlink below Post-Secondary. To change information for a degree, click the hyperlink under Degree field. Click on delete icon to remove corresponding degree.
Post-Secondary Education
Degree
Major
School
Date Issued
Bachelor of Science
Computer Science
Berkeley, University of CA
Add Post-Secondary Education History

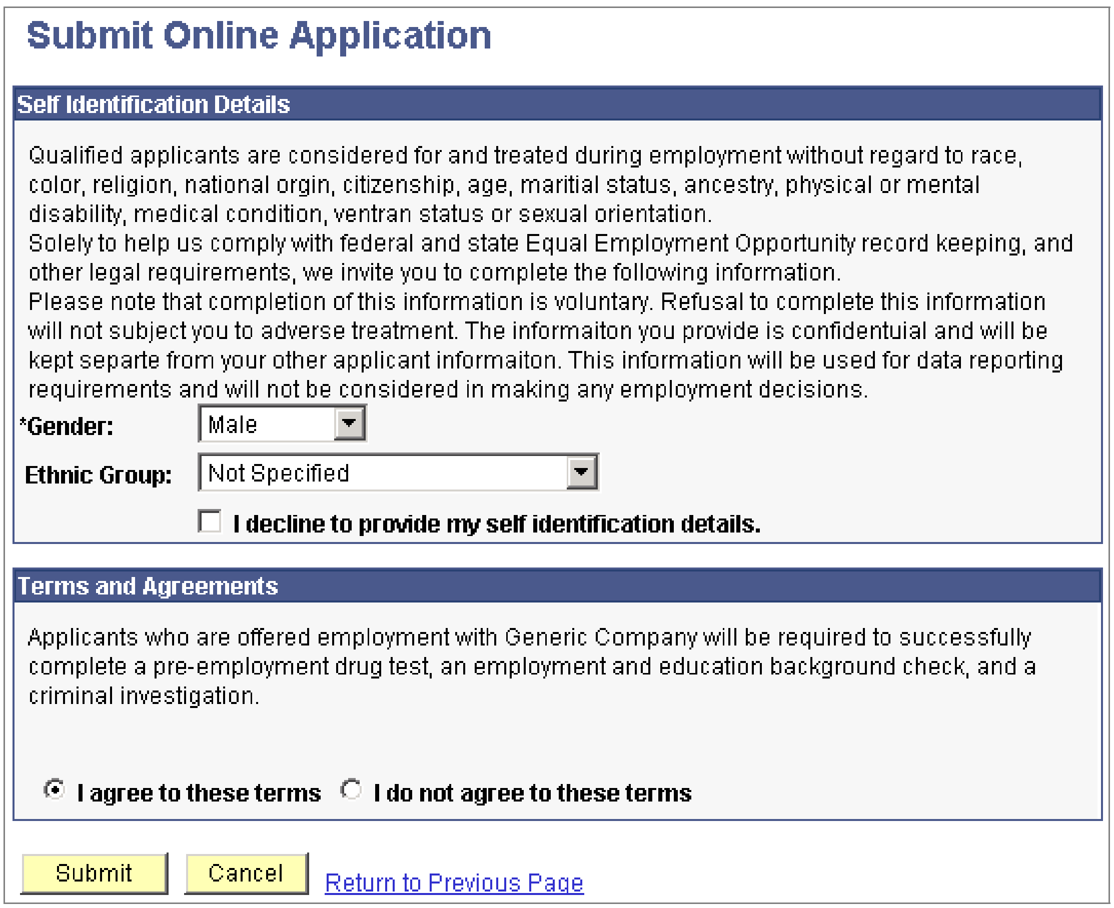


Completing online applications

Terms and Agreements

A key compliance need for customers is the ability to conform to data privacy requirements. Chief among these requirements is a notice to applicants that explains how their data is stored and used.

In Recruiting Solutions 8.9, the Submit Online Application page displays an organization's employment terms. Organizations can add data privacy statements to the Terms & Agreements section or to other Candidate Gateway pages by using the text catalog. Applicants must agree to these terms and agreements to submit the application. Using the text catalog, customers can configure the text to meet their compliance requirements. This feature is most applicable for global implementations.

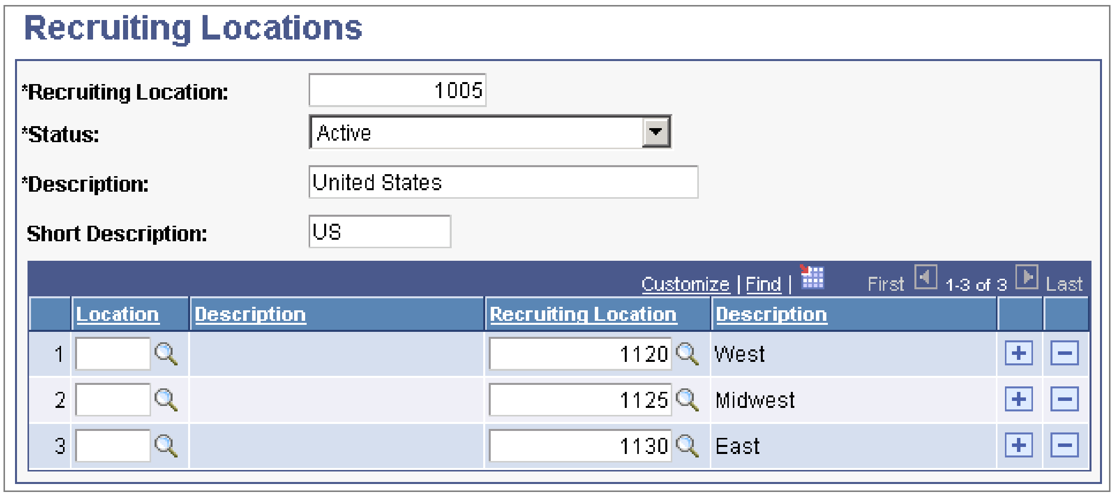


Agreeing to terms and agreements

New Recruiting Locations Table

In the new release, there is a new table for locations within Recruiting Solutions. This table is tied to the HRMS Location table but allows customers to create locations separate from the HRMS locations. With this change, customers can post positions with multiple locations and allow applicants to retrieve them.

For example, you may have a location as Headquarters: Building A. That won't make much sense to an applicant, so you might want to create a recruiting location as Bay Area. If your applicants think of your location as "Bay Area" they might not think to search for a position in "Pleasanton, CA". You can assign multiple locations to a single job opening so it is better to provide more location options if in doubt.



Defining recruiting locations

Enhanced Application Functionality

In addition to the features listed previously, there are many enhancements for job seekers. These include:

- Multiple applications per day.

  Previously, if an applicant applied more than once in a day, the system only saved the most current application. In Recruiting Solutions 8.9, the system tracks each application separately, allowing applicants to send in multiple applications per day.

- Reuse prior applications.

  When applicants return to the site after applying, they can see the details of their previous applications. This capability enables them to reuse the same application to apply to a new position, or use it as a starting point to create a new application. Applicants also have the opportunity to save an application as a draft if they want to return at a later point to complete the application.

Applicants can view all of their submitted and saved applications on the My Career Tools page in Candidate Gateway.

Viewing all submitted and saved applications

Enhanced Job Basket Functionality

In the previous release, if an applicant had jobs saved to the job basket and then ended the session, the jobs were removed from the basket. This was an obstacle for applicants who found a dream job but didn't have time to apply right away. In Recruiting Solutions 8.9, applicants can select and save job openings that they are interested in and apply to these job openings at a later date. Applicants can save jobs on several pages in Candidate Gateway and can view their saved jobs on the My Saved Jobs page. There is no limit to the number of jobs an applicant can save.

Viewing and applying to saved jobs

A company's website is an important branding tool and often shapes an applicant's first impression. With these changes, companies can provide a better experience for target applicants.

Enhanced Search Capability

In this release, we are enhancing our search capabilities, changing the layout, and adding fields. The search functionality takes advantage of the latest version of Verity, which provides better performance and functionality. Results are displayed more effectively, showing users their search criteria for context as well as the search results found.

With these changes:

- Applicants can search for job postings based on a simple keyword search or move to an advanced search that enables them to search on many more fields.
- Recruiters can easily search for applicants based on disposition, application date, and name; as well as referral source, accomplishments, and recruiting location.
- Recruiters can also search for job openings based on specific job criteria that match applicants' interests.

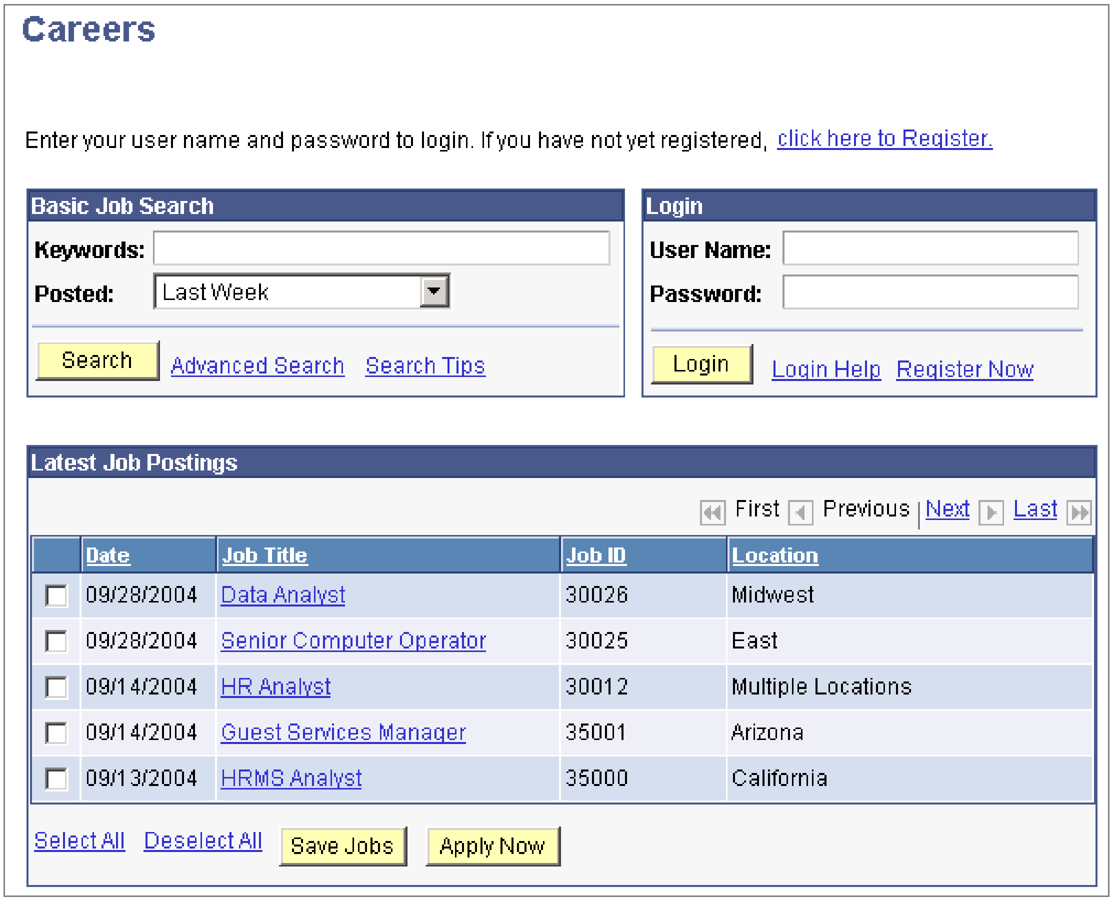
Searching for Job Postings

The new search design combines the View Job Postings with the Job Search Agent. This means the applicant can save search criteria when viewing job postings. When saving search criteria, you can also save the search as a job agent search.

Applicants can perform two types of searches:

- Basic
- Advanced

Basic searches allow applicants to search for jobs that contain key words and that fall within specific posting dates. The key words are compared to the job title and job description. Applicants can perform basic searches from the Careers page, Careers Home page, and the Job Search page.

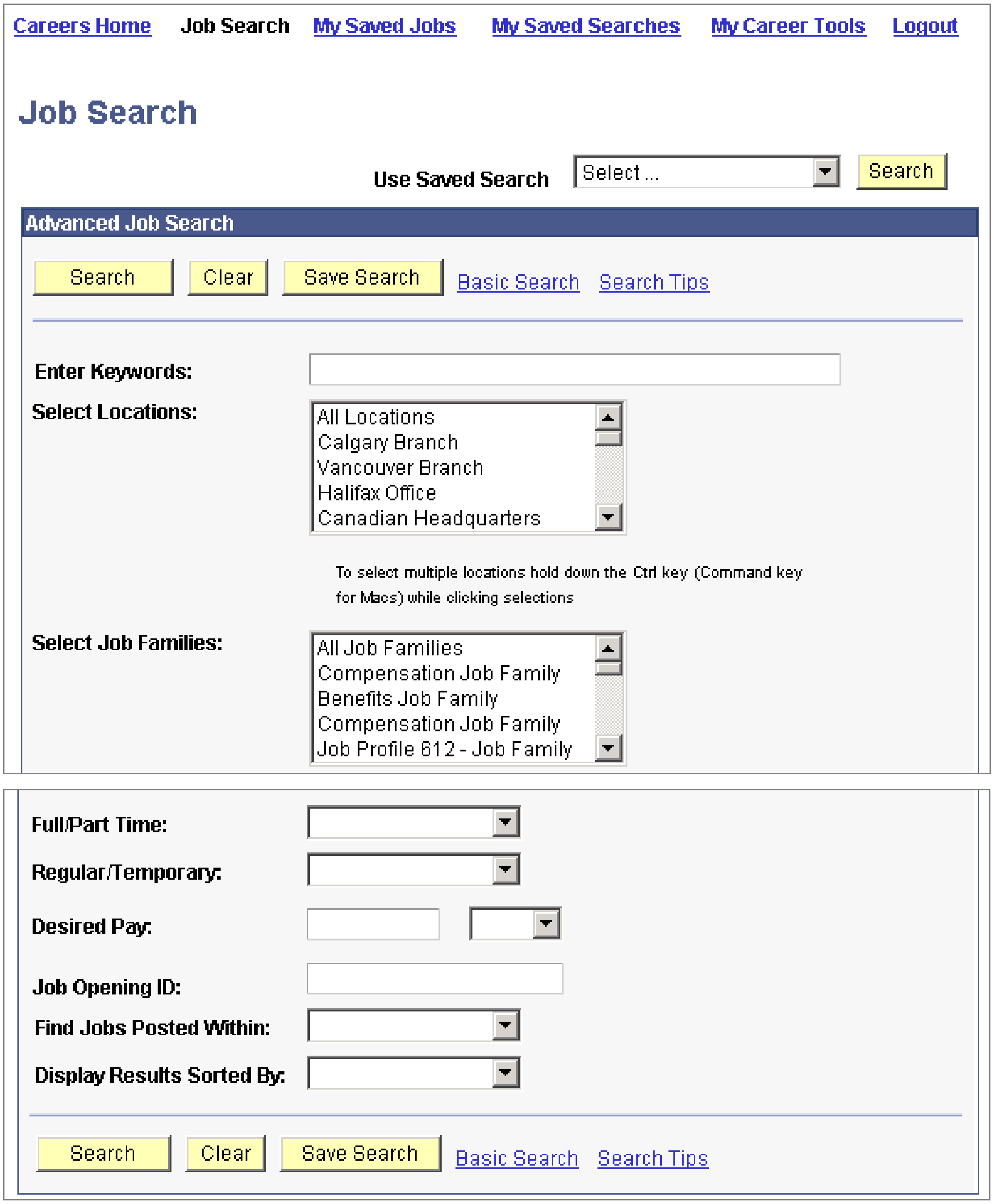


Basic job search

Advanced searches enable applicants to enter additional search criteria to search for jobs. Internal and external applicants can search for jobs based on key words, location, job family, job type (full-time, part-time, temporary, regular), desired pay, job opening ID, and posting dates.

Internal applicants can also search for jobs based on recruiter or hiring manager. Applicants can perform advanced searches on the Job Search page. Applicants can choose to sort the search results by posting date, posting title, job opening number, job family, or location.

The system compares the search criteria to different types of job data.



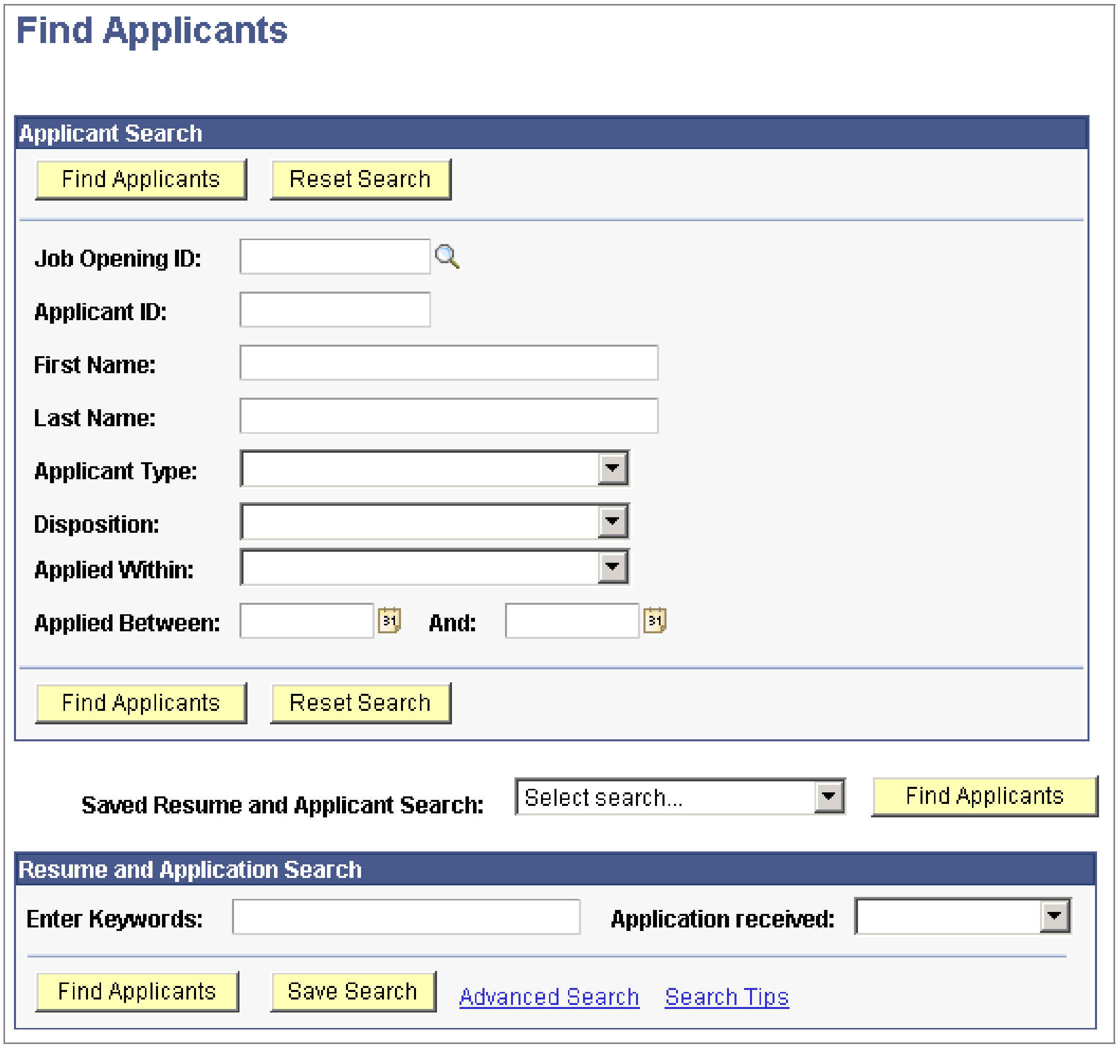
Advanced job search

Searching for Applicants

Finding qualified applicants for your job openings is a major task for recruiters. The Find Applicant page enables you to:

- Search for applicants in the applicant database based on specific record fields.
- Search for applicants whose resume text or attached resume match specific words related to job requirements.

Note. Just as with job postings, you can perform a basic or advanced search.

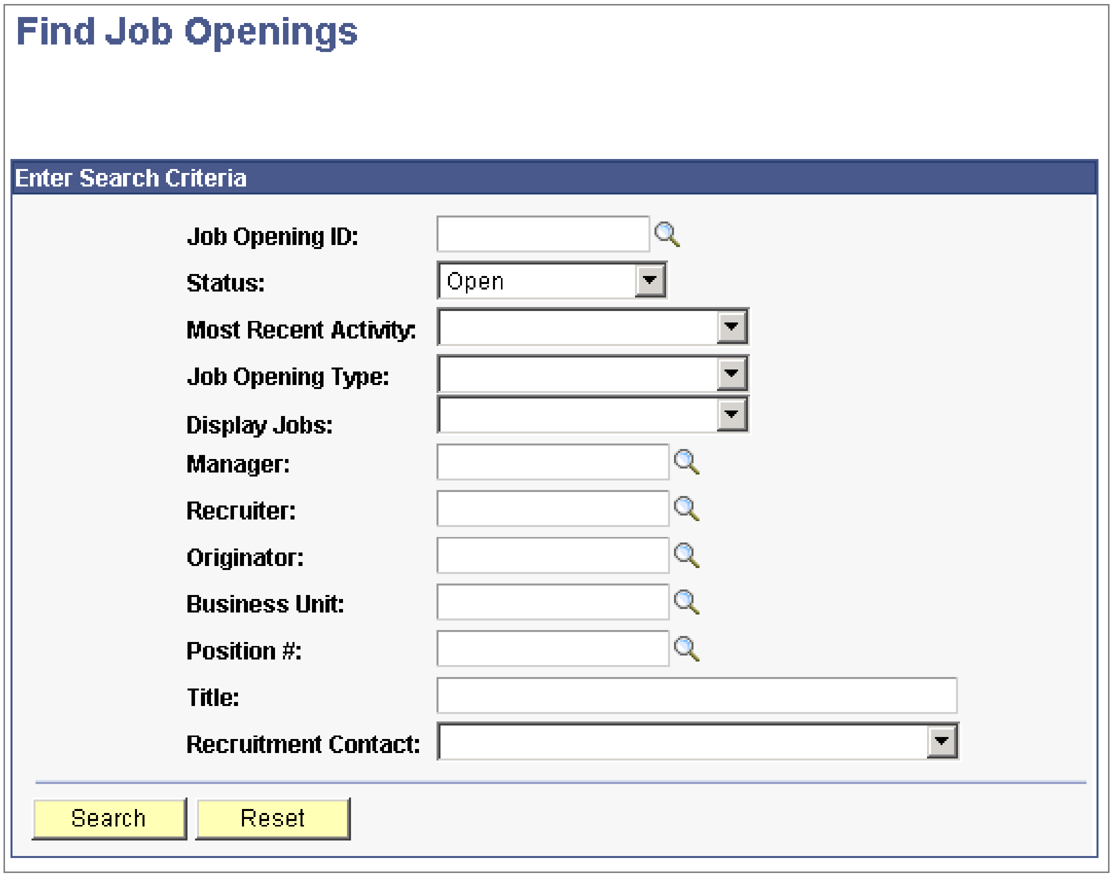


Completing a basic and resume search

An advanced applicant search combines both the Verity search and record specific search features on the same page. It provides more search options based on referral source, accomplishments, competencies, education, work experience, and various location options.

Searching for Job Openings

Recruiters can also search for specific job openings based on various job opening criteria such as job opening or position ID, status, job opening type, and team members assigned to the job opening.



Search for job openings

Enhanced Usability

For Recruiting Solutions 8.9, we are moving from a transaction orientation to presenting screens that allow users to find information, context, and analysis before taking action. A good comparison is Amazon.com, which provides access to reviews and ratings to help users decide which book to purchase. We want to enable users to access the decision support information they need to select an applicant or apply for a job.

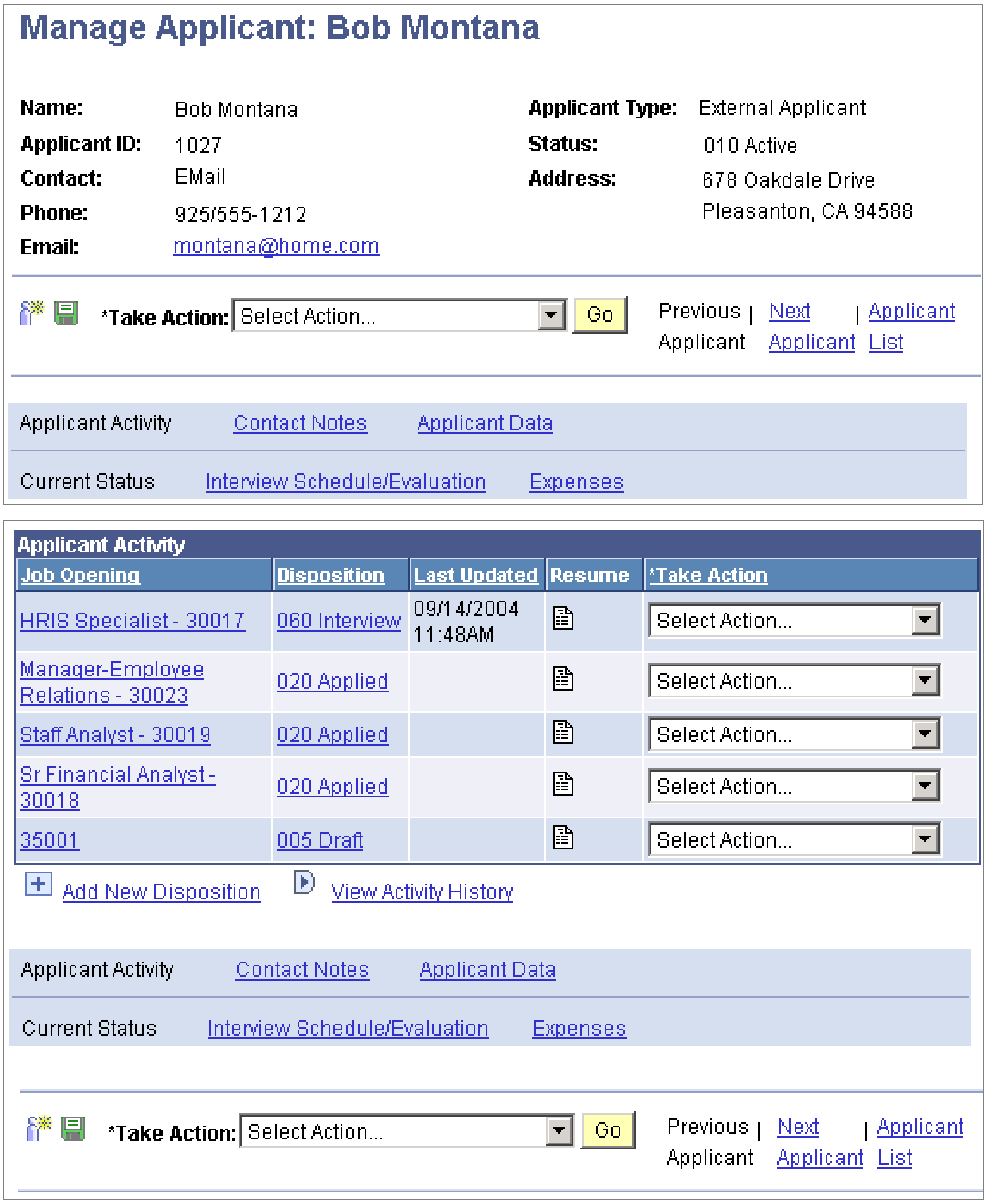
New 360-Degree Views

In Recruiting Solutions 8.9, we are creating 360-degree views for applicants and job openings. These pages bring together the similar pages (history, activity, and detail) and present the information in one view. By providing these pages together, users are one click away from most of the transactions that they want without having to use the left navigation menu to get there. They can easily see other activities or actions, which helps them to decide to act on an applicant or to change a job opening. This enhancement allows better decision making for recruiters and managers.

360-Degree Views for Applicants

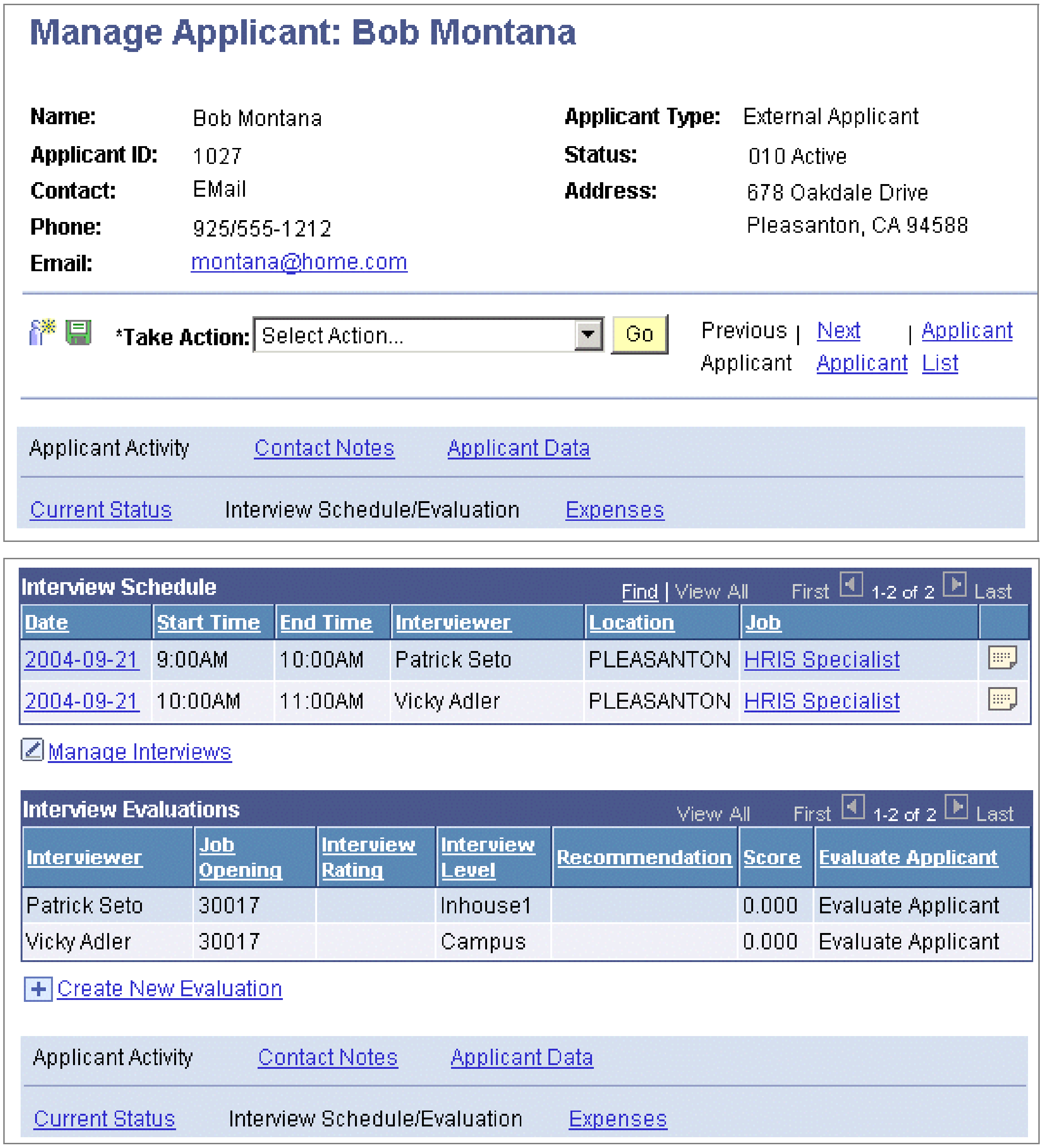
The Manage Applicant pages are intended to serve as a complete view of an applicant. The applicant's information is grouped into sections such as Applicant Activity, Contact Notes, and Applicant Data.

On the Manage Applicant - Applicant Activity: Current Status page, you can review all the job openings to which an applicant is linked along with the disposition status for each job opening.



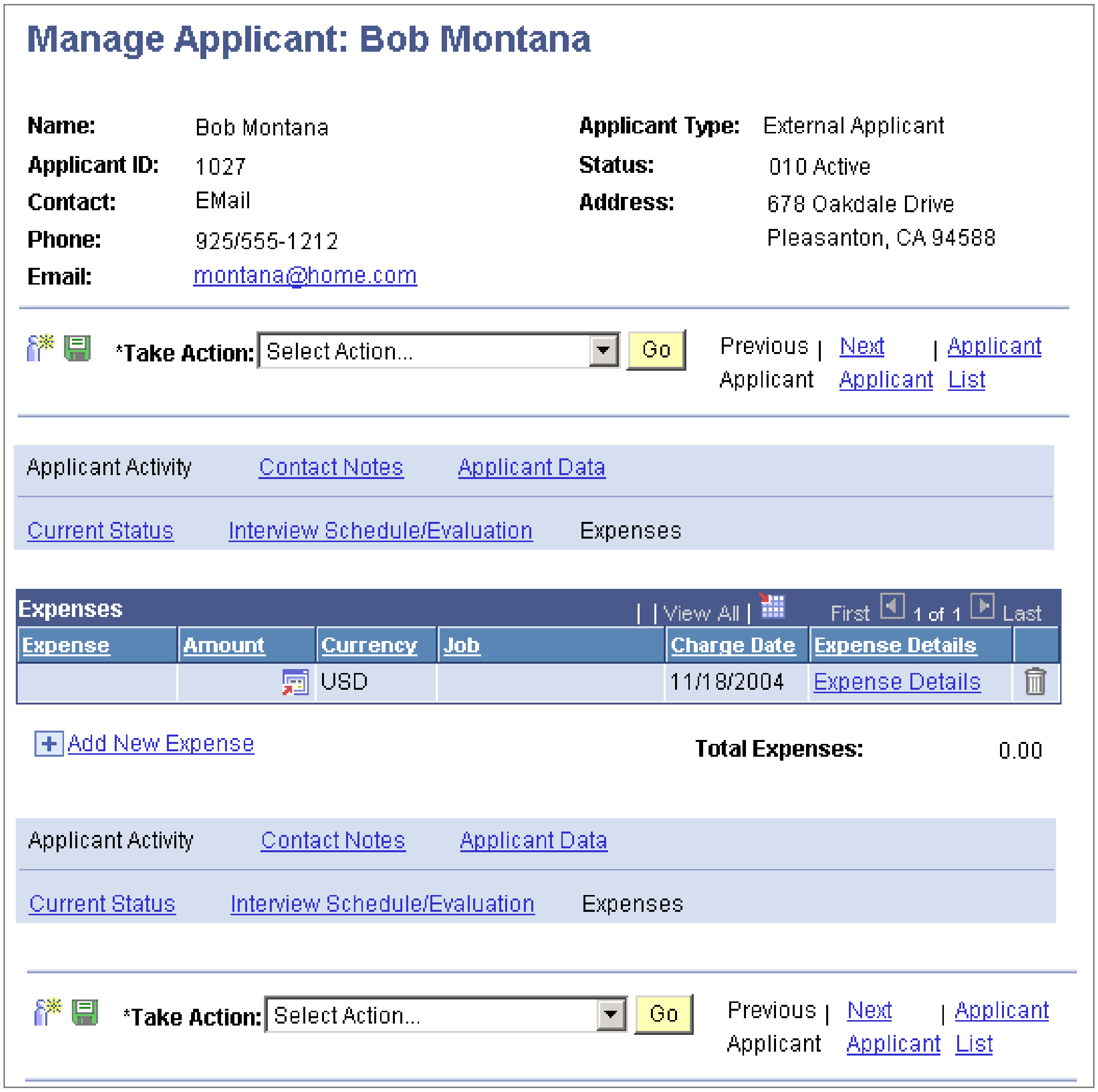
Managing applicants from central location

Within the Manage Applicant - Applicant Activity: Interview Schedule/Evaluation page you can also view the applicant's interview schedule and interview evaluations. This page also provides access to the Manage Applicant - Interview Schedule page that enables you to schedule an interview.



Reviewing applicant interview schedules and evaluations

Another feature of Manage Applicants is adding expenses associated to the applicant. There is a link that takes you to a page that is used to enter expenses.



Reviewing expenses

The Take Action field enables you to perform many applicant-related tasks from one central location. You can:

- Create interview evaluations.
- Evaluate competencies.
- Add applicants to checklists.
- Schedule interview.
- Prepare job offers.
- Prepare to hire applicants.
- Route applicants.
- Send correspondences to applicants.

360-Degree Views for Job Openings

The Job Opening pages are intended to serve as a complete view of job openings. The job opening information is grouped into sections such as Manage Applicants, Find Applicants, Activity & Attachments, and Job Opening Details.

Managing job openings

The Job Opening: Manage Applicants page displays a list of all the applicants linked to the job opening. Clicking the applicant's name takes you to the Manage Applicant page where you can review applicant information and perform tasks related to the applicant.

The Job Opening: Find Applicants page displays the applicant search feature where you have access to all search and save functions.

The Job Opening: Activity & Attachments page displays the job opening history, notes, attachments, and expense details. Links are available that enable you to add a note, attachment, or expenses related to the job openings.

The Job Opening: Job Opening Details page displays job opening information for you to review and modify.

More Configuration Options

One common issue for customers is word choice. Customers frequently request changes to a button label or instruction text. Many customers also want to be able to vary their recruiting processes and text for various audiences (for internal or external applicants or for different business units).

In Recruiting Solutions 8.9, two tools are available for customers to use in configuring their application: message catalog and text catalog. By using these tools, customers can change instructional text, button labels, and links to match their business needs. They can also segment the application actions by Applicant Type or SetID, among other criteria.

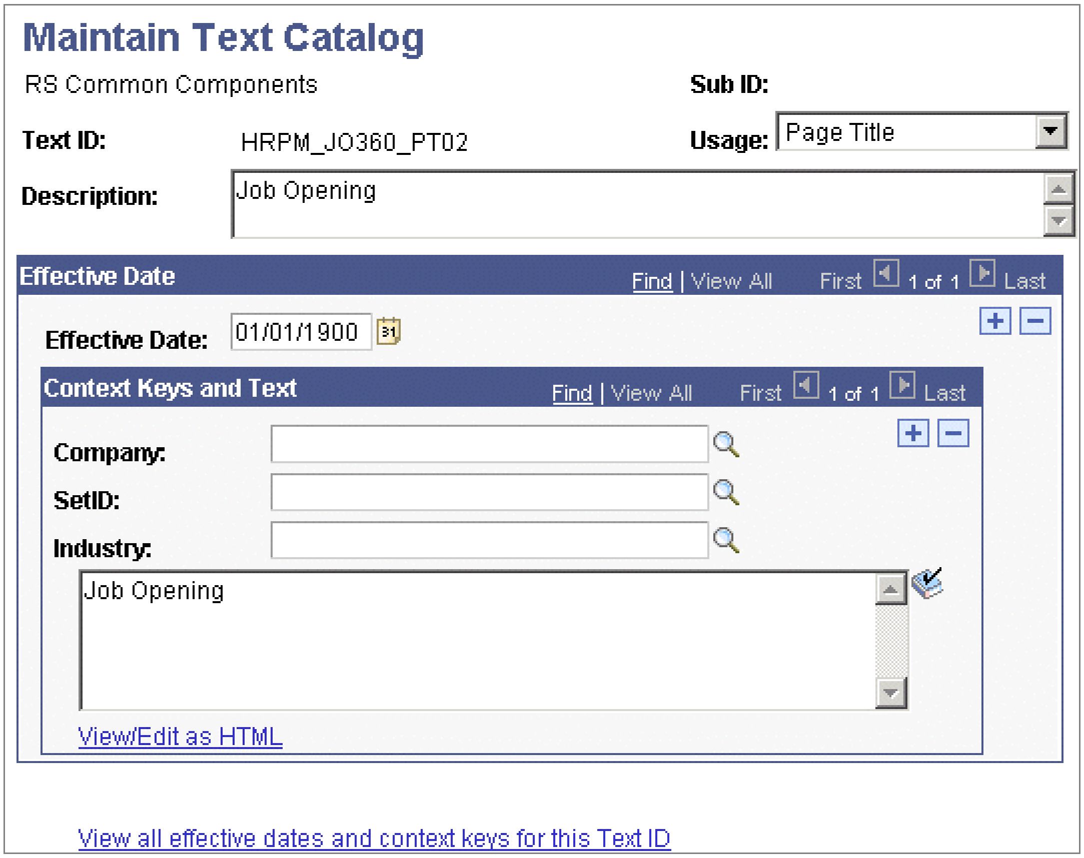
By presenting information in a context, updating the product layout, and increasing the configuration options, we ensure that users can make better decisions for applicant and requisition management.

Text Catalog

Recruiting Solutions 8.9 is using the text catalog to maintain the following page elements:

- Page titles
- Buttons
- Instructional text
- Links

You use the Maintain Text Catalog page to modify any page elements.



Modifying text on pages

To find the objects owned by Recruiting Solutions, search on *HRS* for objects related to administrative pages and *HRAM* for objects related to Candidate Gateway pages.

The Context Keys and Text group box defines the delivered text. For HRS you can modify text according Company, Set ID and Industry. For HRAM, you can modify text according to Site ID and Applicant Status.

Enhanced Integration

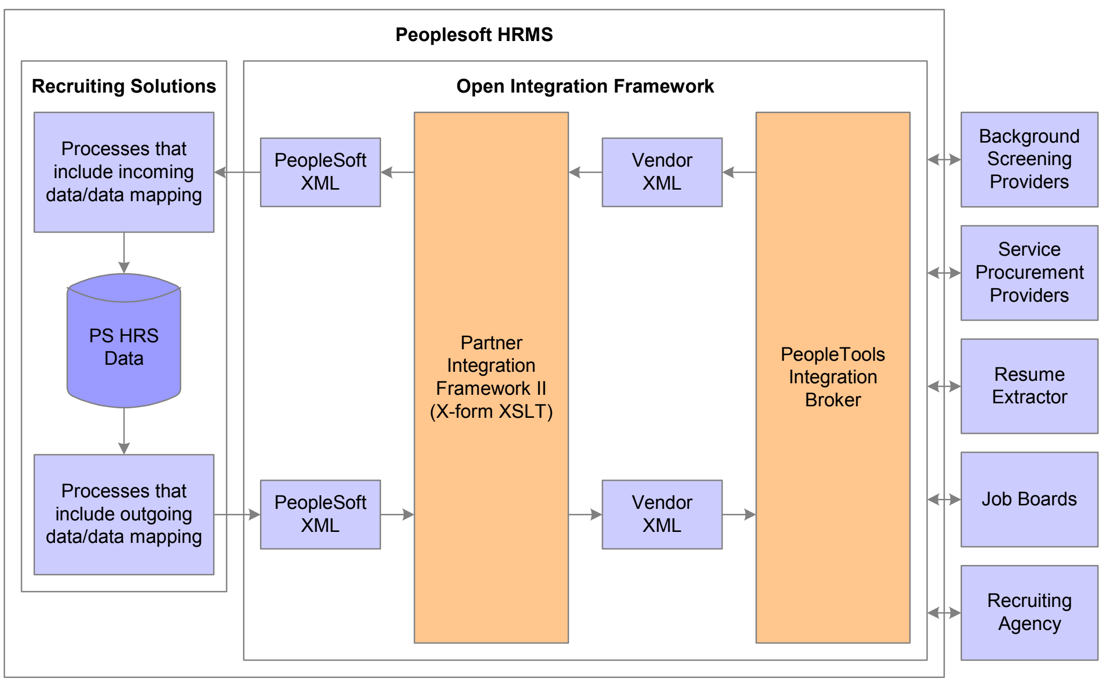
The ability to integrate with specialized vendors is a key need for Recruiting Solutions. Every customer has its own preferred vendors that it wants to integrate into the application. In 8.9, PeopleSoft provides an Open Integration Framework that enables you to integrate with:

- Resume extractors.
- Staffing suppliers.
- Background screening providers.

This generic Open Integration Framework allows customers to integrate with any third-party provider that they choose. For incoming data, the process is initiated by an incoming message. Using PeopleSoft PeopleTools Integration Broker, the Open Integration Framework process reads the XML document contained in the message and uses the standard XSLT to transform the XML according to the vendor's specifications. Finally, the Open Integration Framework maps the transformed data to the corresponding recruiting data and processes that information.

For outgoing data, a functional process such as posting a job opening or requesting a background screening check, initiates the outgoing message. The process reads from the recruiting tables and uses data mapping to create an XML document. This initial XML document may be changed into to an HR-XML document. Another change is then applied to either the initial XML document or to the subsequent HR-XML document, depending on the supplier's needs, to create a final document. The final document is then sent using PeopleSoft PeopleTools Integration Broker.

This diagram illustrates the Open Integration Framework:



Open Integration Framework

The new Open Integration Framework is a key deliverable for this release. It allows our customers to integrate with third-party vendors without significant configuration. It also provides PeopleSoft with a strong framework to expand into additional integrations in the future (for example, with assessment providers or interview scheduling tools).

More Options for Resume Management

In Recruiting Solutions 8.9, we are providing more options for resume management. Our Open Integration Framework allows customers to choose from many extraction tools and third-party vendors. By using XML, vendors can enter resumes into the database for customers. This integration enables customers to choose the extraction tool that best meets their needs. We have also enhanced the process to enable applicants to validate their information as it is entered into the system.

Source tracking now enables customers to track not only the referral source (such as online job board or agency) but also the channel that the applicant used to apply (such as online or email attachment).

These changes are designed to facilitate acquisition of applicants while increasing the quality of the data and the information that is presented on applications.

More Options for Background Checks

The delivered background check integration has been moved to the new Open Integration Framework. This change supports customers who want to use their preferred background check provider. They can integrate vendors into the business process flow by using this framework.

Enhanced Business Processes

In addition to the changes mentioned previously, we provide several key features in Recruiting Solutions 8.9. These features are available for recruiters and managers. The guiding design is to provide tools to support core recruiting needs.

Robust Approval Processes

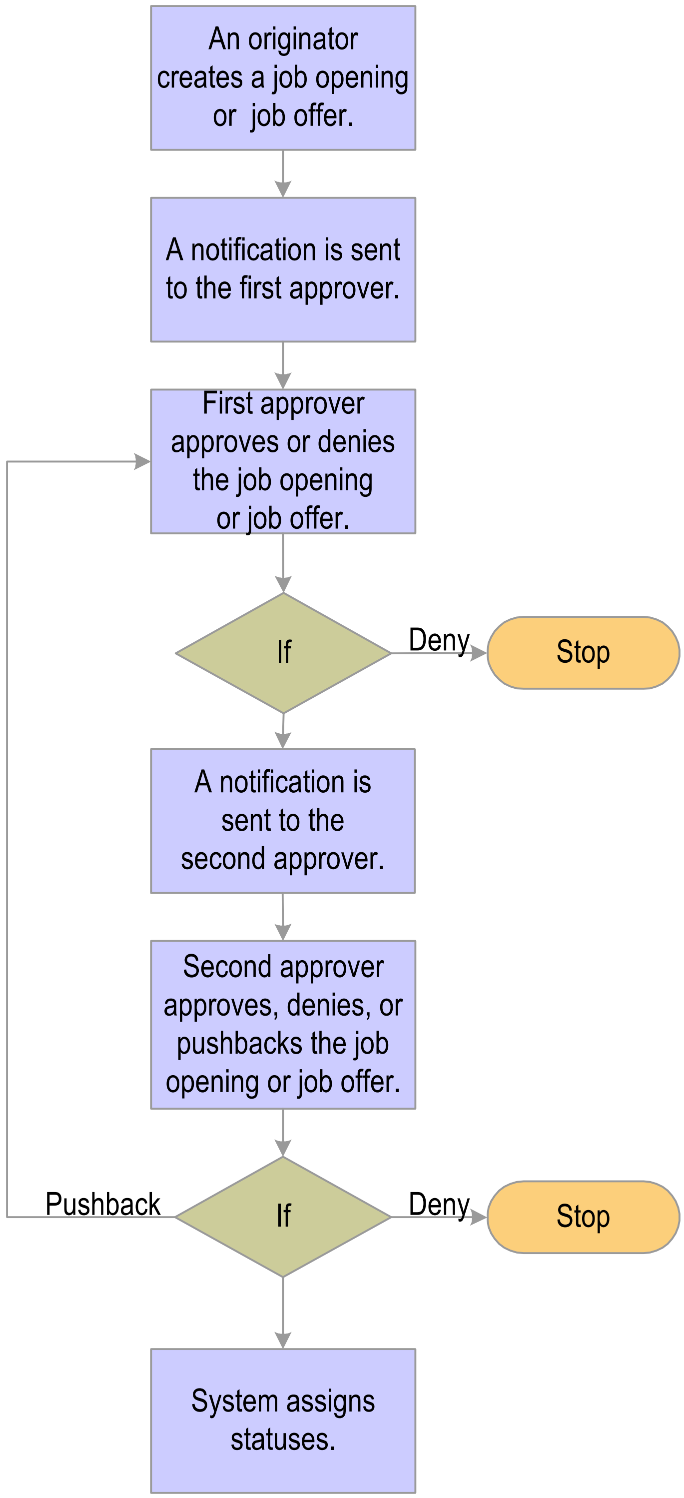
For many customers, approvals are required before they can work on a job opening or extend an offer. But each company requires a different number of approvals and involves different approvers. In many companies, the approval chain also differs between business units.

In this release, we introduce a new approvals engine. This tool was designed to provide a more robust approval process for requisitions and offers. With this new engine, companies can have different approval chains by business unit. They can manage separate approval cycles for requisitions and offers. Users can add approvers to the job opening while it is in the approval process. The new tool also supports adding *reviewers*—people who need to be notified but don’t have approval authority—into the workflow.

Recruiting Solutions delivers two approval processes:

- For creating job openings.
- For creating job offers.

The approval process for both of these is the same. This diagram outlines the approval process:



Recruiting Solutions approval process

Better Support for Recruiting Processes

The recruiting process that PeopleSoft has delivered up to this point has been primarily requisition-based. Although this model is applicable for many customers, it is not the only model our customers use to fill positions. To better support all our customers, we have removed some of the constraints currently placed on the process:

- Job openings

  Some positions are always open; they may be high turnover positions or just difficult positions to fill. Sometimes a recruiter needs to start sourcing for a position before a job opening is approved. In both cases, a job opening doesn't meet the need.

  In Recruiting Solutions 8.9, we introduce the concept of a *Continuous Job Opening*, which contains position information and can be posted to various websites. It does not function like a *Standard Requisition*, however—no approvals are required, and it does not count for time-to-fill metrics. The goal of this posting is to attract applicants and then forward them to requisitions as the need arises.

- Status effects

  We are introducing new statuses for recruiters. *Linked* allows recruiters to have a different status for applicants whom they have linked to the job opening, as opposed to those who applied for the position; *Review* allows recruiters to indicate those applicants whose information they have already considered. These statuses help recruiters to move applicants through the process and be clearer about what action might come next.

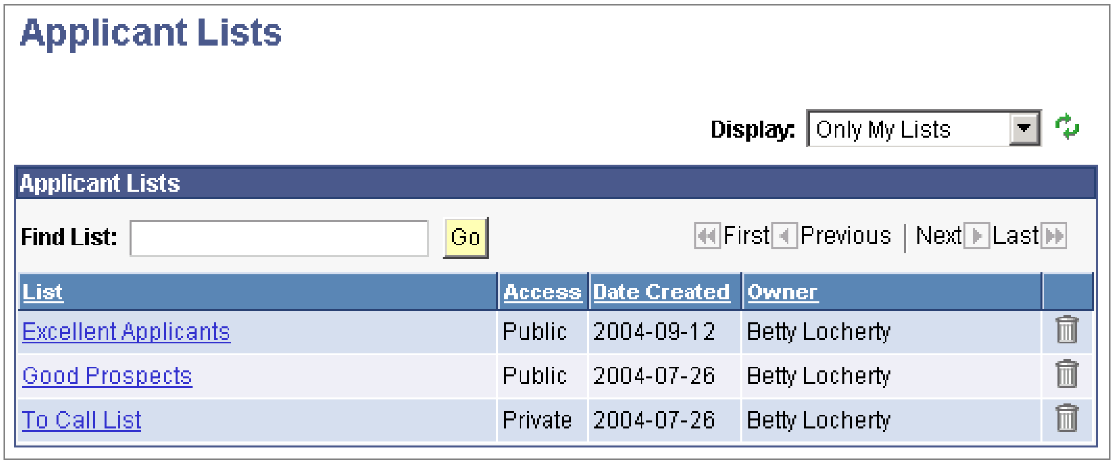
- Additional actions

  In Recruiting Solutions 8.9, we are expanding the actions that can be taken on an applicant, regardless of whether that applicant has been associated with a job opening. It is possible to interview an applicant or even create an offer without a job opening.

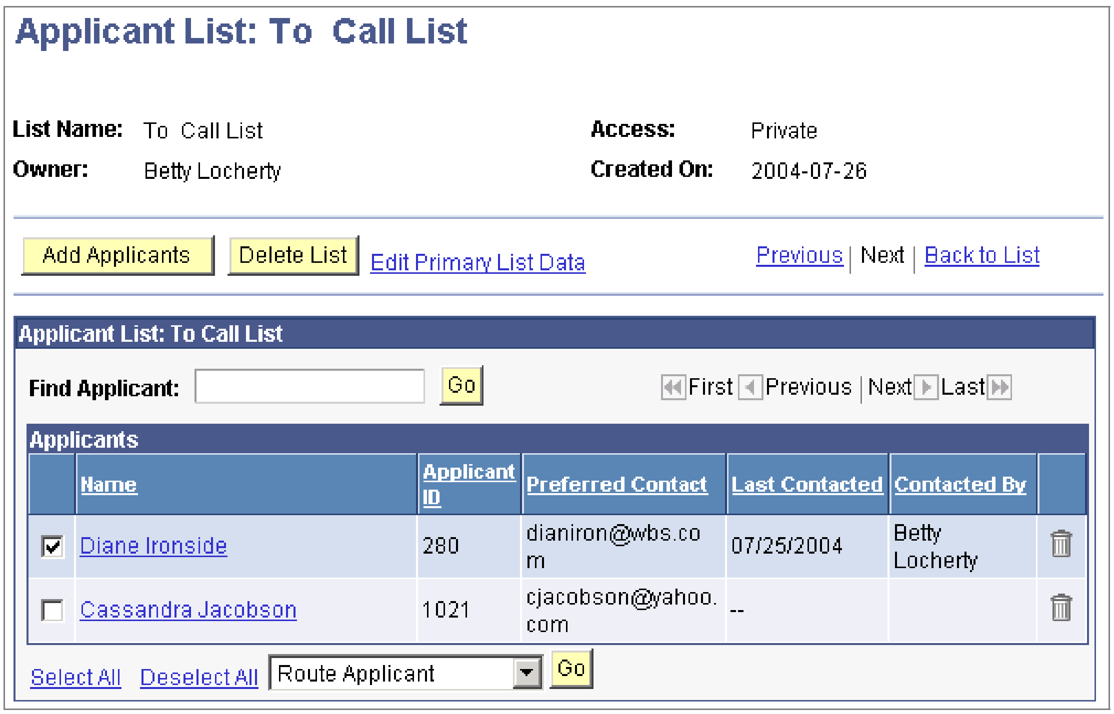
New Applicant Lists

Many recruiters like to maintain informal lists of applicants. These may be people to whom they have spoken about a position that isn't yet open, hot applicants for certain types of jobs, or applicants in a specific region. In any case, these lists are not associated to a job opening.

In Recruiting Solutions 8.9, we support creating applicant lists. Users can create an applicant list from search results or from other criteria and modify the contents over time. Applicant lists can be made public to facilitate applicant management among recruiters or kept private. From an applicant list, recruiters can add contact notes to the applicants, link applicants to job openings, route and forward applicants to other users for review, add applicants to existing and new applicant lists, and send correspondence to applicants.



Viewing applicant lists



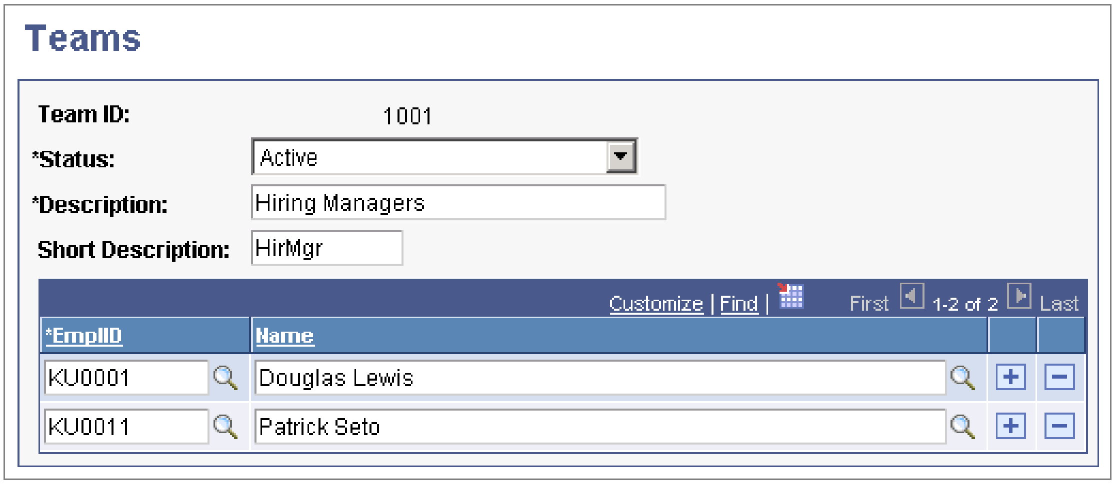
Managing an applicant list

New Recruiting Teams

It may be necessary to associate a group of recruiters, hiring managers, or interviewers to a job opening. Assigning teams to a job opening when it is created can help expedite the recruiting process.

When you create a job opening, you have the option of entering a team or individuals to the following areas: Recruiters. Hiring Managers, Interviewers, and Interested Party.

Team members associated with a job opening have access to that job opening, regardless of their role and associated permission lists.

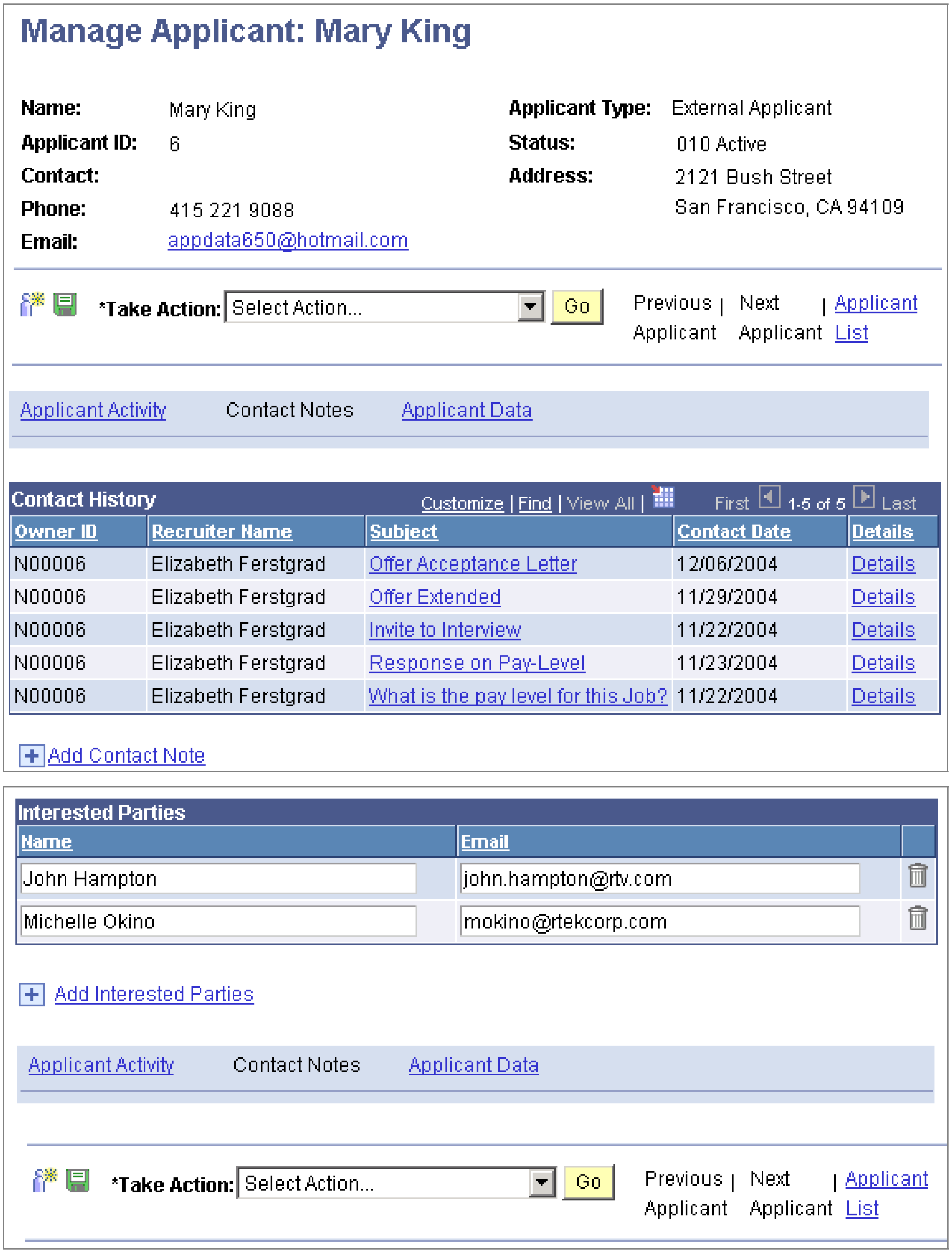


Creating recruiting teams

Better Contact Management

Managing an applicant is at least 50 percent of a recruiter's job. Until now, all the informal tracking (email, notes on which to follow up, and so on) had to be done outside the PeopleSoft system.

In Recruiting Solutions 8.9, we provide the option to track notes and correspondence with applicants. Users can add notes on the applicant record and make them public or private. Attachments can also be added to the notes if the user wants to cut and paste a message or add a document to the message. Users also have a new correspondence module, which enables them to create email and send it to individuals or groups of applicants. When email is generated, a copy is automatically appended to the applicant's file.



Viewing contact history for an applicant

With these key features, we increase the support we offer to recruiters, who are the system's power users. These tools make it easier for companies to use multiple methods of recruiting, whether requisition or applicant-based, and to track their activities in the system.

Better Screening Process

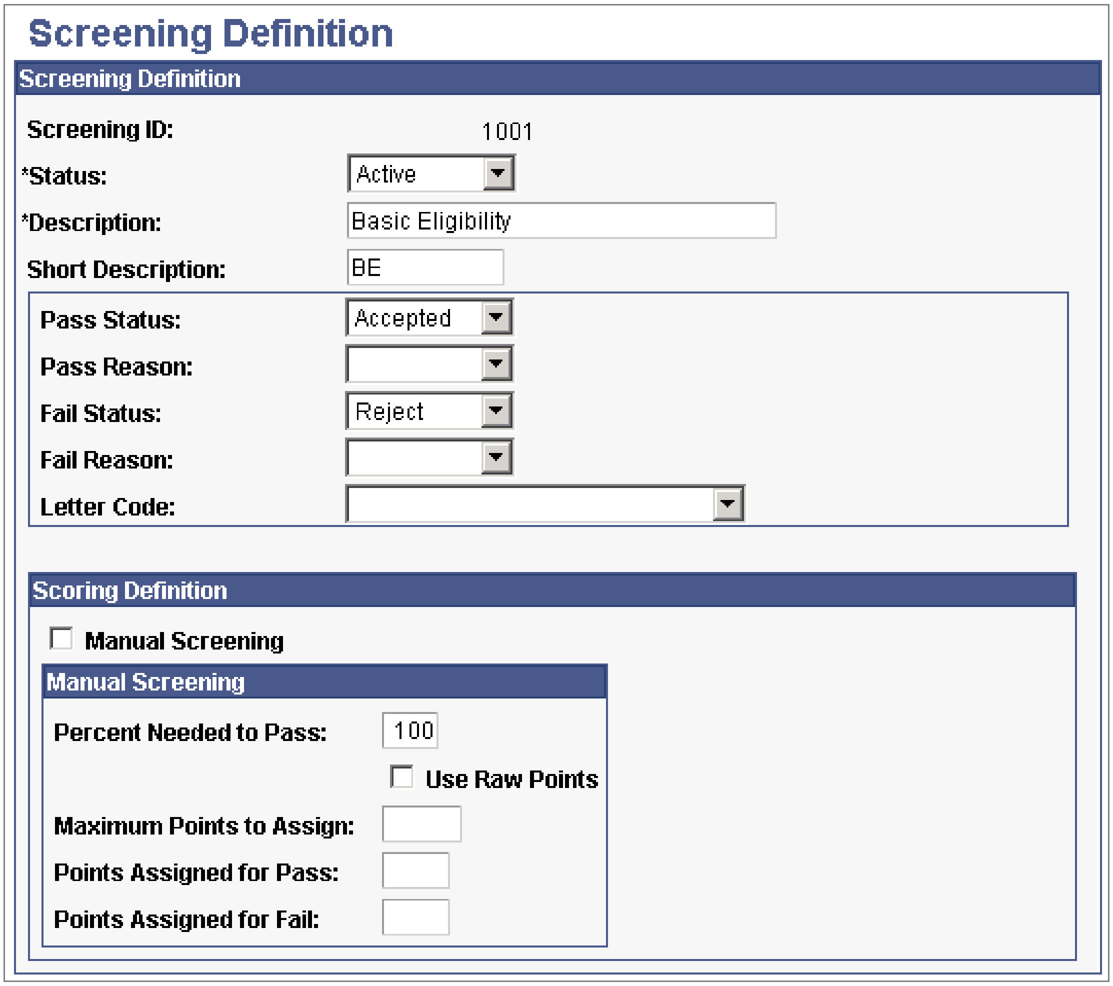
As part of our Recruiting Solutions 8.9 design, screening is available to self-service users. In the new design, screening becomes an integrated part of the process.

Federal functionality has merged with the core process. While there are some key differences in how federal users must evaluate applicants, the two screening processes have much in common. The enhancements to applicant screening provide a common approach for shared requirements while allowing federal-specific functionality to be maintained.

User Defined Screening Levels

Using the Screening Definition page, you can define your own screening levels. This enables you to evaluate applicants against the screening criteria all at once or break the criteria down into distinctive categories that are processed separately.

The Screening Definition page defines the pass or failed status that is assigned to the applicant, the pass or fail reason codes, and the recruitment letter that is sent to the applicant if they fail the screening level.



Defining screening levels

PeopleSoft delivers five types of screening levels that should meet most needs:

- Preliminary
- Final
- Basic Eligibility
- Minimum Qualifications
- Ranking

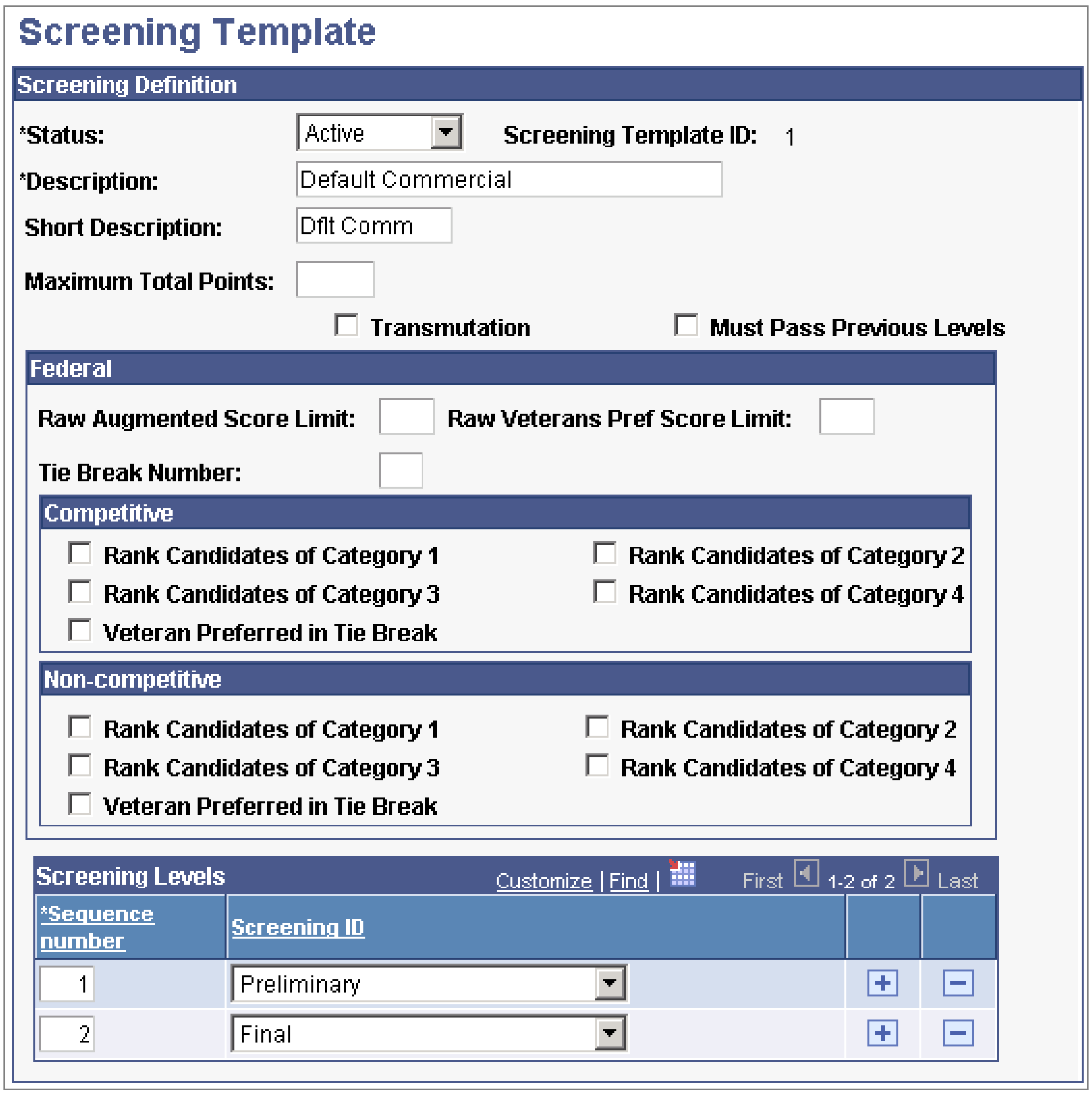
Once you have defined the screening levels that your organization requires, you link the appropriate screening levels to a screening template. You can create as many screening templates as you wish.

The Screening Template page defines the total points that an applicant can receive during the entire screening process. It defines whether transmutation is to be used and whether the applicant must pass one level before moving on to the next level.

For Federal customers, this is where you assign the maximum augmentation points that an applicant can receive, maximum veterans preference points, and the tie-breaking number. The ranking plan is also defined on this page.

To assign screening levels, use the Screening Level group box. This is where you decide whether you want applicants to be screening against all the screening criteria at once, or break the screening criteria into separate discrete processes.

Note. At this point, you still haven't defined the screening criteria that will be used to evaluate the applicants. This is done later when you create a new job opening.



Adding screening levels to the screening template

The next step is to link the screening template to a recruitment template. This step is still the same as before. Now you are ready to define the screening criteria.

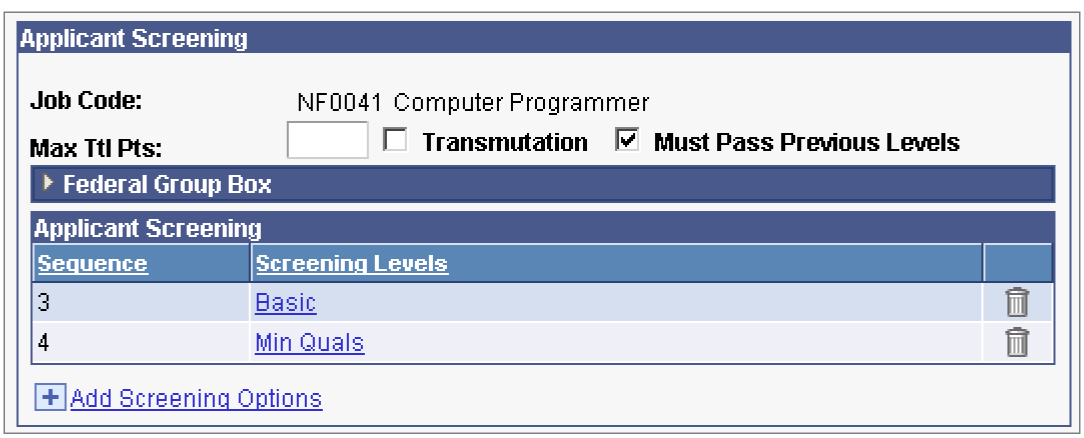
Define Screening Criteria

We provide you with a defined set of parameters that may be used to evaluate applicants:

Job Opening Information	Staffing Information	Salary Information	Accomplishments	Competencies
Citizenship Status	Full/Part Time	Minimum Salary	Education & Experience	Varies
Gender	Shift	(USF) Minimum Pay Grade	Languages	
Draft Status	Regular/Temporary		Honors/Awards	
Maximum Age	Standard Hours/Week		Licenses and Certificates	
Minimum Age	Travel Percentage		Memberships	
(USF) Recruiting Type				
Location				
RS Location				
Start Date				

Note. Other screening criteria can be tests and screening questions.

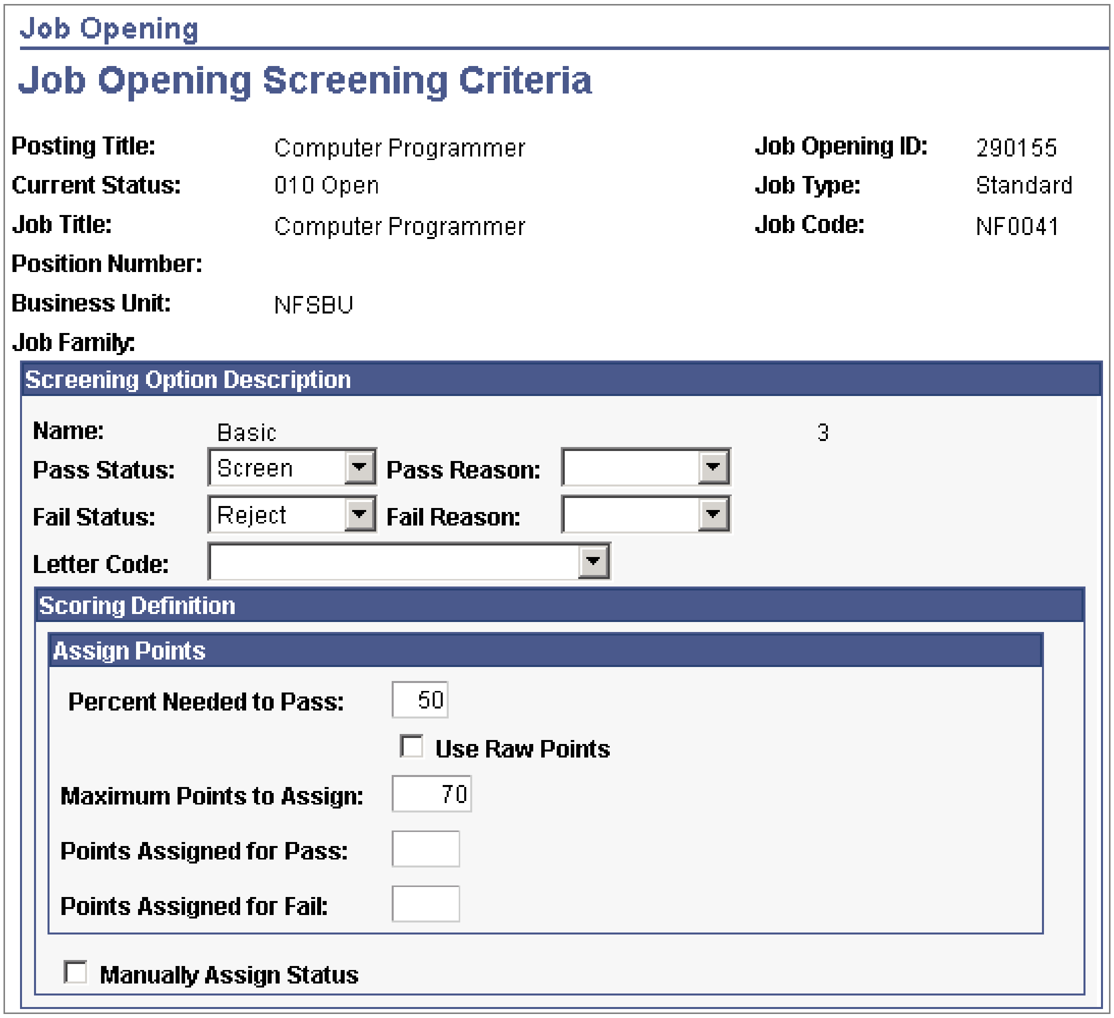
Screening criteria is defined when you create a job opening. Screening criteria is based on the job opening requirements.



Screening portion of the Job Opening page

When you click the name link of the screening level, the system displays the Job Opening - Job Opening Screening Criteria page. This page contains the information that was defined on the Screening Definition page for this screening level as well as the job opening requirements defined on the Job Opening page that actually have data entered in the requirement group box.

You select the criteria that you want to use for the screening level and assign points.



Assigning points

Screening Requirements Customize | Find |

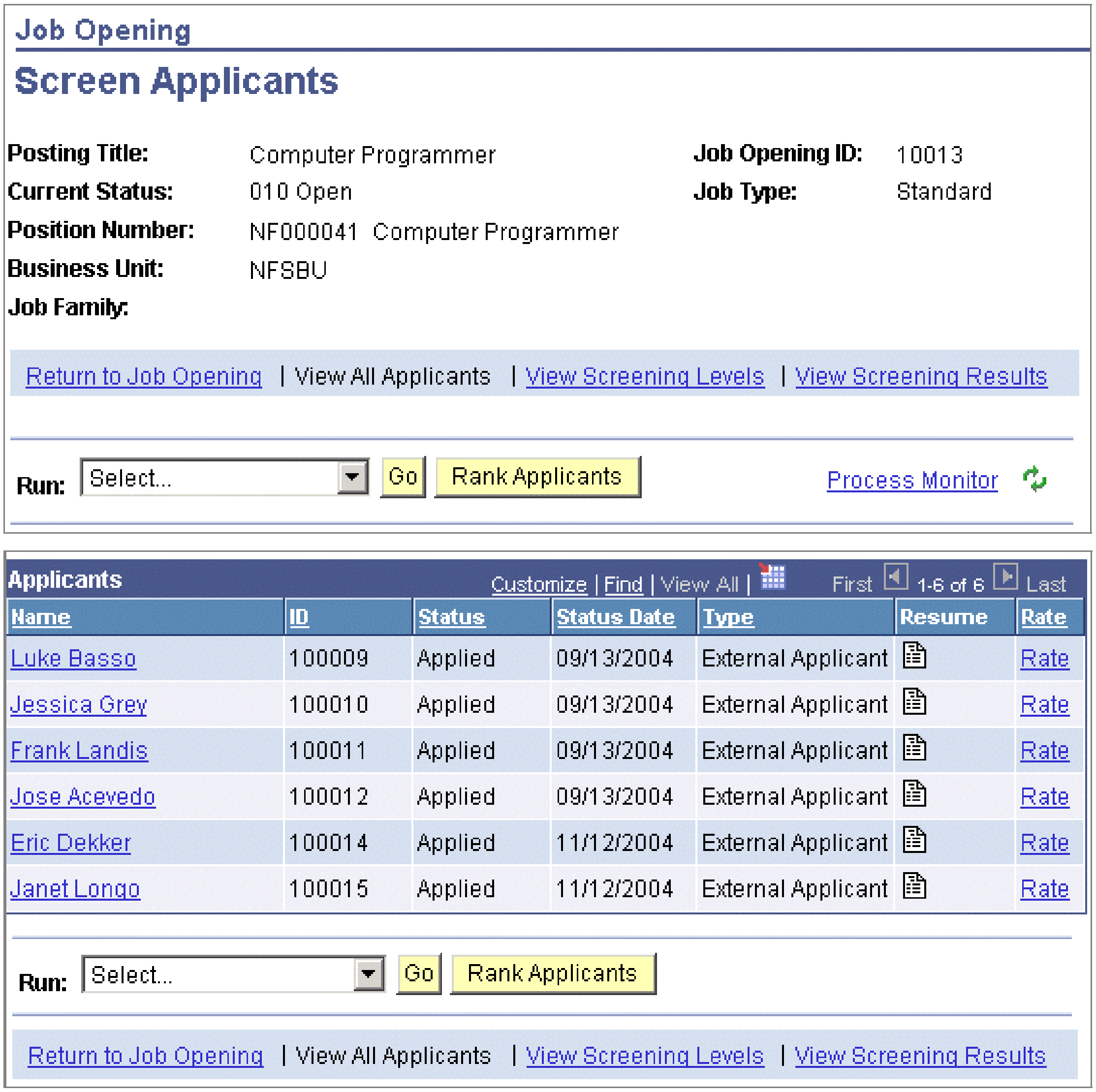
Screening Type	Description	Use in Screening	Required	Augment	Selective	Points
General Requirement	Regular / Temp : Regular	☑	☐	☐	☐	10
General Requirement	Full / Part Time : Full-Time	☑	☐	☐	☐	11
General Requirement	Shift : N	☑	☐	☐	☐	12
General Requirement	Minimum Age : 18	☑	☐	☐	☐	3
General Requirement	Sex : U	☑	☐	☐	☐	4
General Requirement	Citizenship Status : 1	☑	☐	☐	☐	5
General Requirement	Standard Hours : 40	☐	☐	☐	☐	0
General Requirement	Minimum Salary : 74335 - Year	☐	☐	☐	☐	0
General Requirement	Minimum Grade : 14	☐	☐	☐	☐	0
Education & Experience	Education: Bachelor's Degree, 0 Years of Experienc	☐	☐	☐	☐	0
Accomplishment	General Clerical Skills	☐	☐	☐	☐	0
Accomplishment	French	☐	☐	☐	☐	0

Identifying screening criteria

Streamlined Screening Process

Screening applicants is now its own component, easily accessed from the Job Opening page. You simply find and select the job opening and click the screening icon . From the Job Opening - Screen Applicants page you can:

1. Review applicants linked to a job opening.
2. (USF) Run the priority placement process.
3. Review applicant competencies and accomplishments.
4. (Optional) Rate applicant competencies and accomplishments.
5. Review and edit screening requirements.
6. Run screening levels.
7. (USF) Assign competitive and noncompetitive statuses to applicants.
8. (USF) Rank applicants.
9. Run the Certificate of Eligibles process.



Job Opening

Screen Applicants

Posting Title: Computer Programmer
Job Opening ID: 10013
Current Status: 010 Open
Job Type: Standard
Position Number: NF000041 Computer Programmer
Business Unit: NFSBU
Job Family:

Return to Job Opening | View All Applicants | View Screening Levels | View Screening Results

Run: Select... Go Rank Applicants Process Monitor

Applicants Customize | Find | View All | First 1-6 of 6 Last

Name	ID	Status	Status Date	Type	Resume	Rate
Luke Basso	100009	Applied	09/13/2004	External Applicant		Rate
Jessica Grey	100010	Applied	09/13/2004	External Applicant		Rate
Frank Landis	100011	Applied	09/13/2004	External Applicant		Rate
Jose Acevedo	100012	Applied	09/13/2004	External Applicant		Rate
Eric Dekker	100014	Applied	11/12/2004	External Applicant		Rate
Janet Longo	100015	Applied	11/12/2004	External Applicant		Rate

Run: Select... Go Rank Applicants

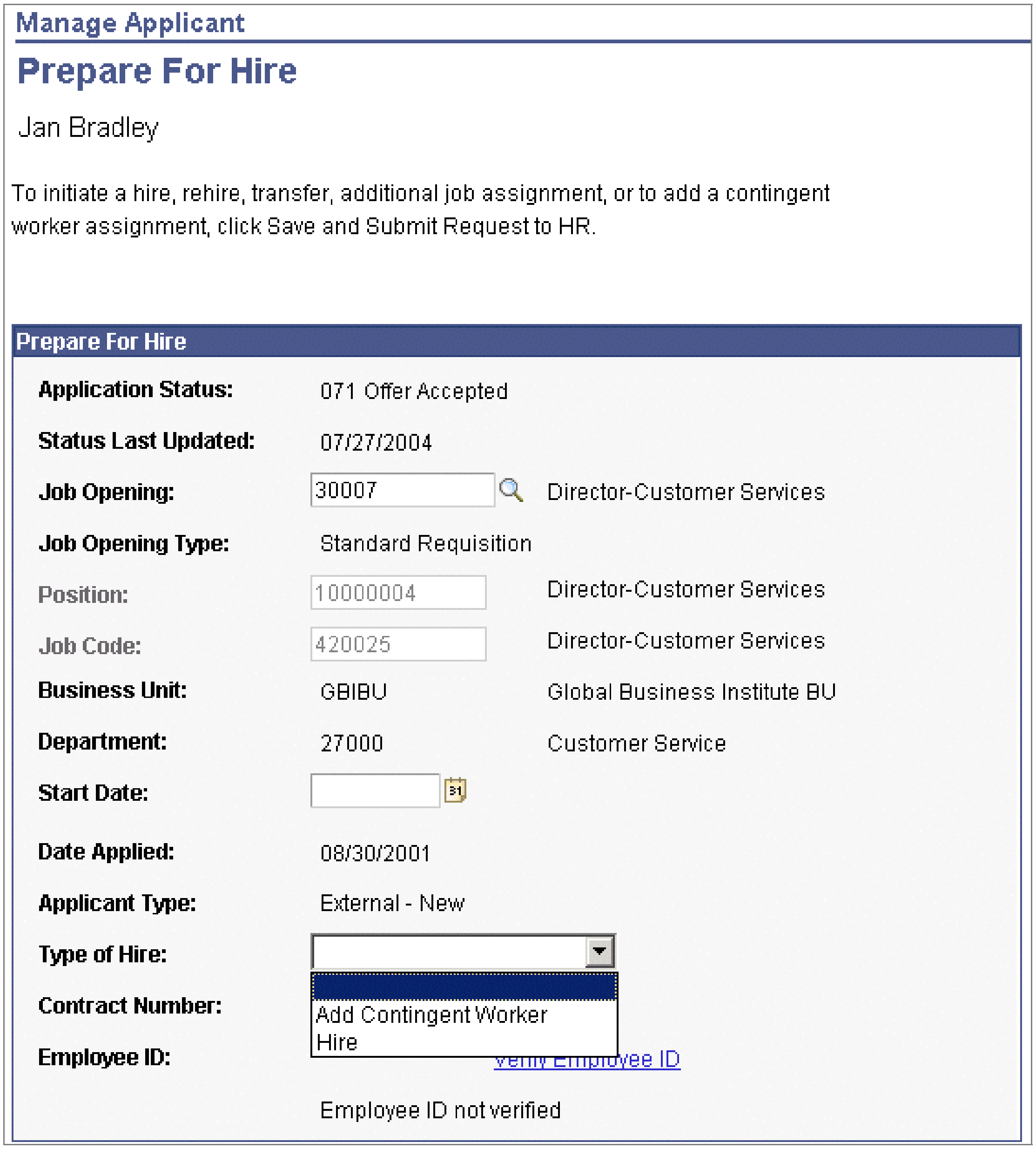
Return to Job Opening | View All Applicants | View Screening Levels | View Screening Results

Applicants linked to job opening

Better Hiring Processes

In Recruiting Solutions 8.9, we leverage the Person Model to enhance the pools of applicants who can be managed by Recruiting Solutions. This enhancement includes developing a process to support internal transfers, and enabling users to find applicants who are rehires and leverage their previous employee IDs.

Companies that want to track contingent or on-demand workers in their HR database can identify the type of worker when executing the hire. These changes facilitate the final part of the recruiting process by eliminating workarounds and replacing them with a streamlined hiring process that can be used for all worker types.



Manage Applicant

Prepare For Hire

Jan Bradley

To initiate a hire, rehire, transfer, additional job assignment, or to add a contingent worker assignment, click Save and Submit Request to HR.

Prepare For Hire

Application Status:	071 Offer Accepted	
Status Last Updated:	07/27/2004	
Job Opening:	30007	Director-Customer Services
Job Opening Type:	Standard Requisition	
Position:	10000004	Director-Customer Services
Job Code:	420025	Director-Customer Services
Business Unit:	GBIBU	Global Business Institute BU
Department:	27000	Customer Service
Start Date:		
Date Applied:	08/30/2001	
Applicant Type:	External - New	
Type of Hire:	Add Contingent Worker Hire	
Contract Number:		
Employee ID:		Verify Employee ID
	Employee ID not verified	

Hiring applicants

A Final Word

PeopleSoft is making a major investment in Recruiting Solutions for this release. The features selected were primarily a result of customer feedback and have been validated by months of customer interaction.

This release is significant in terms of features and technical design. By making this investment, we are confident that our customers will continue to see significant value from Recruiting Solutions.

Assess, Design, Develop Enhancements

The second business process in the employee life cycle is Assess, Design, Develop. This business process encompasses workforce development. To get the most out of their employees, companies must identify top talent for future planning and development and ensure that their employees are executing organizational strategies. The functionality in this business process enables our customers to assess the skills of their workforce, design learning and performance programs, and develop their people in alignment with career paths and corporate objectives.

Every industry around the world is facing intense competition and more stringent governance and compliance demands. To answer these challenges, business leaders want to encourage superior levels of efficiency and performance from their workforce and tie those increases directly to key company objectives to improve operating results. To do so, organizations need to assess the competencies and knowledge of their global workforce, design effective performance and learning programs that directly support business initiatives, and develop individuals in alignment with departmental goals and organizational objectives.

What makes PeopleSoft unique in this arena? We are the only vendor to provide a single, global, integrated, and highly scalable talent management solution. We offer unmatched breadth of functionality that includes the ability to plan organizational skill and competency needs, assess the current capabilities of the workforce, identify competency gaps, create learning and performance plans, plan workforce careers and successions, set performance goals based on organizational objectives, and develop employees based on defined business goals.

What’s New in PeopleSoft Enterprise ePerformance 8.9?

Workforce performance management is one of the fastest growing segments of the human capital management software market. Research continues to provide conclusive proof that leading organizations are those that have strong performance management practices. ePerformance is designed to enable performance management best practices and to assist organizations in aligning corporate goals with workforce or individual goals. Most enterprises want to increase the productivity of their workforce. ePerformance helps ensure that employees have the optimal competencies to do their work. It also delivers the ability to quickly assess that each employee is focused on achieving the most important business goals for their role in the organization. ePerformance further provides immediate value by facilitating pay-for-performance initiatives that can improve overall business performance.

ePerformance 8.9 delivers an expanded feature set to further assist organizations in all their performance management activities and processes. It offers unparalleled flexibility by providing the framework and processes that enable organizations to successfully manage development and assessment evaluations for their entire workforce. For the first time, organizations can design, deliver, and modify performance processes for all employee development and performance activities. These can be initiated as single events or integrated processes, as part of a formal assessment appraisal or evaluation process, or to reinforce enterprise-wide pay-for-performance programs or initiatives.

These new features enable organizations to implement and administer employee-initiated performance or development assessment processes. The new multi-source feedback capability enables you to include feedback from people other than the employee and manager directly into the performance process.

Process Enhancements

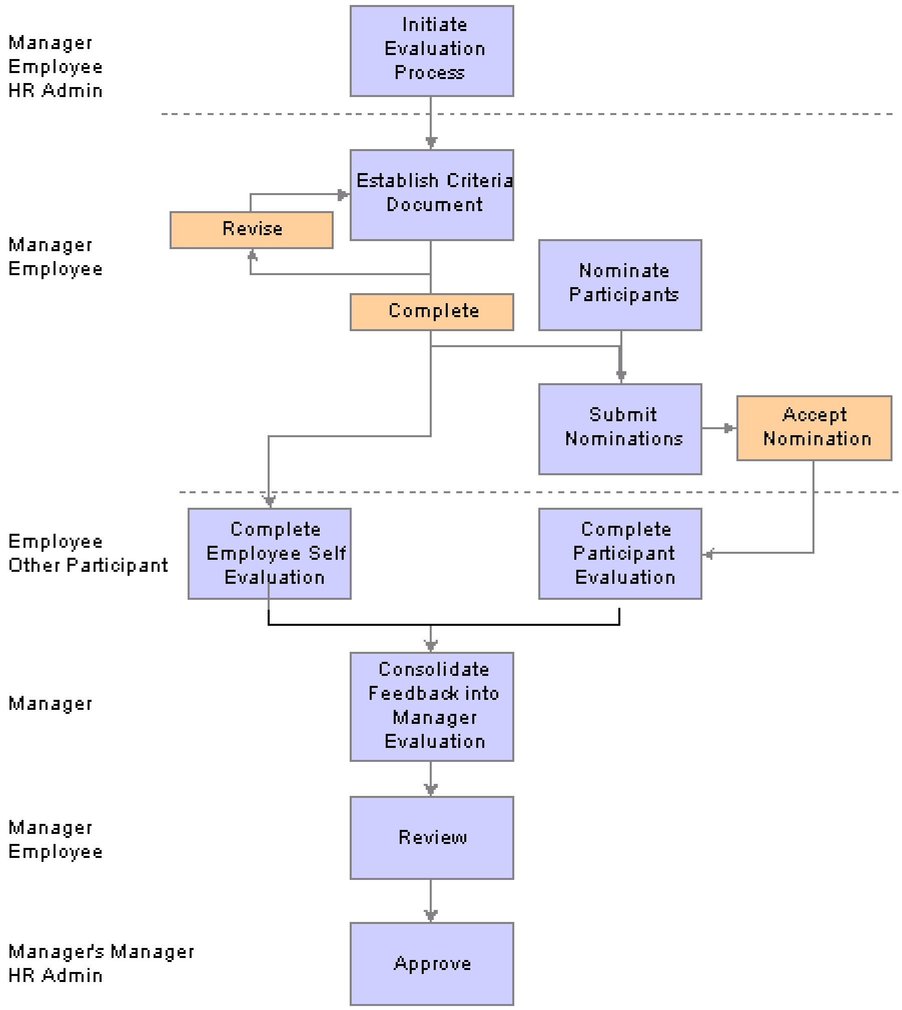
For 8.9, PeopleSoft has made significant enhancements to ePerformance in the following areas:

- Ability to modify evaluation criteria for individuals.
- Multisource functionality (360-degree and multi-rater capabilities).
- Employee-initiated performance process.
- User interface enhancements.
- Enhanced writing tools.
- Ability to delete documents.
- Improved administrative capabilities.

ePerformance 8.9 Business Processes

You can take advantage of the flexibility that ePerformance provides you by designing multiple document templates to implement different subsets of ePerformance functionality and customize the business process to meet your needs.

This diagram illustrates the full range of the business processes that ePerformance supports:



ePerformance business processes

The manager, employee, or HR Administrator initiates the process by creating documents. Employees can only create documents for themselves; managers can create documents for employees or groups that report to them; HR administrators (HR Admins) can create documents for groups of employees.

Optionally, the employee and/or manager tailor the document's evaluation criteria to the employee. Criteria modifications include: adding either free-form or pre-defined criteria, modifying the text of document criteria, or removing criteria. Upon completion of this step, managers and employees can begin work on their evaluations.

Optionally, the employee or manager nominates participants to provide additional feedback and submits nominations to participants. Managers and employees can track nominations that have been submitted and cancel outstanding nominations. When a nominated participant accepts a nomination, a participant evaluation is created for them. Managers and employees can also view the status of the participant evaluation.

Employees, managers, and (optionally) other participants complete their respective evaluations by rating evaluation items and entering comments.

The manager views average ratings and consolidates feedback into their evaluation. During this step, the manager can optionally make use of several tools: notes that they entered pertaining to the evaluation; comments from other evaluators pertaining to the evaluation; development tips that are based upon competencies and sub-competencies; results writer statements that are based on competencies and sub-competencies; average consolidated ratings from other evaluators pertaining to the evaluation; and a language checker that checks language for objectionable or inappropriate terms.

Depending on the document template definition, these tools are also available to employees and other participants. However, the manager makes primary use of these tools when completing an evaluation.

(Optional) The manager sends the evaluation to the employee for review.

(Optional) The manager submits the evaluation for approval.

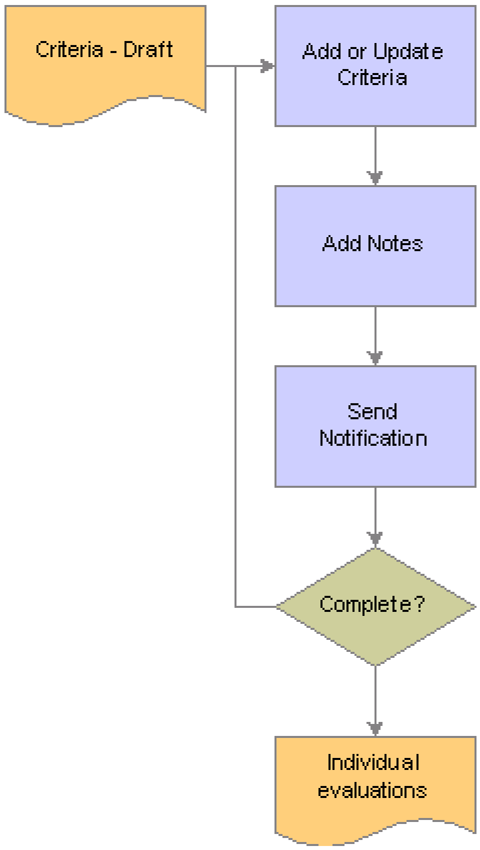
Depending on the review and approval process that is defined in the document template, the final two steps might occur in reverse order.

Evaluation Criteria Modification

ePerformance 8.8 provided managers with the ability to modify the evaluation criteria on a document while the performance evaluation was in progress. In 8.9, this capability is retained and extended. The manager and employee can now collaboratively agree on the criteria that will be used to evaluate the employee, as the first step in the evaluation process.

The Establish Criteria step is enabled on the document template, which also defines the abilities of the manager and employee within this step and the sections where evaluation criteria can be added, modified, or removed. If the Establish Criteria step is enabled for a document, it is performed as the first step in an employee evaluation.

This diagram depicts the Establish Criteria process:



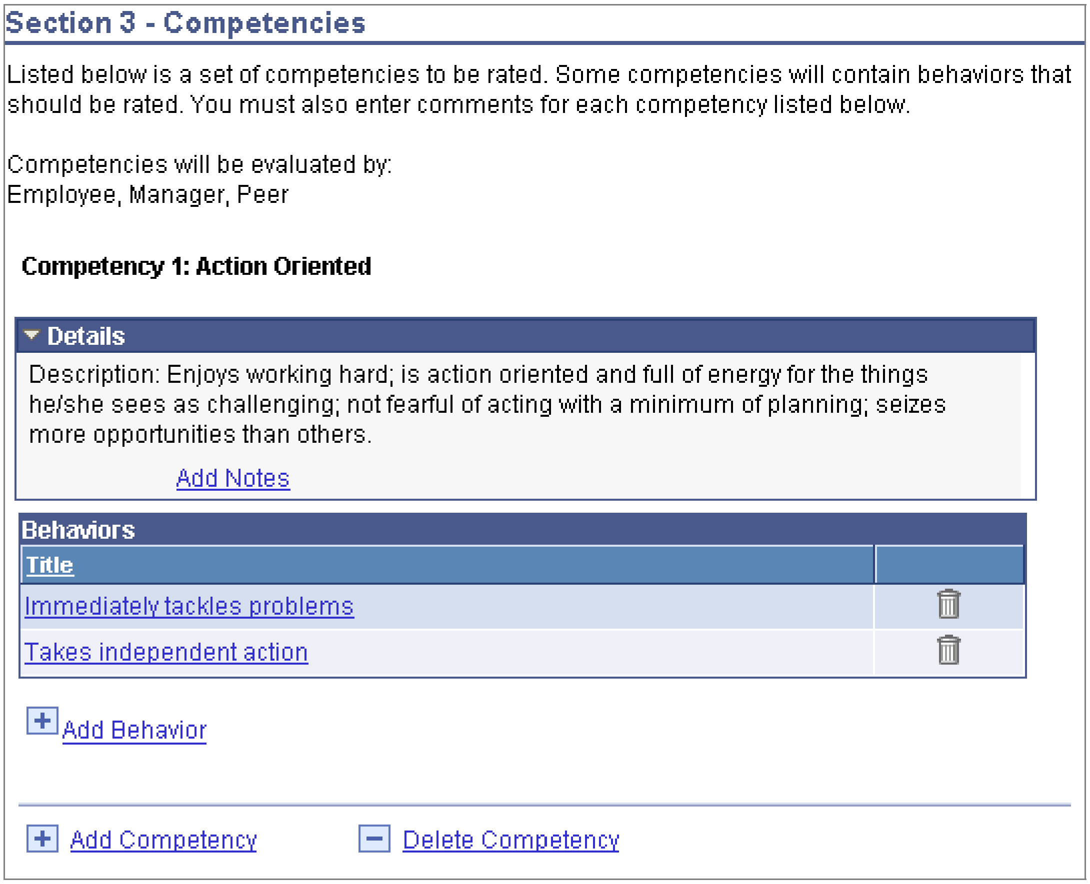
Establish Evaluation Criteria process

If the Establish Criteria step is enabled, a draft criteria document is generated from the document template. The employee and/or manager, as defined on the document template, can then add, modify, or remove evaluation items from sections where this capability is enabled. Collaboration between the employee and manager is accomplished through notifications, which can be sent to the other party when criteria are updated. When both parties agree on the established criteria, the employee or manager marks the criteria step as complete.

Employees and managers cannot start work on their individual evaluations until the Establish Criteria step has been marked as complete. Additionally, nominations cannot be submitted to prospective multi-source participants until this step is complete.

Either the employee or manager can make notes during the Establish Criteria process. These notes are accessible only to the person that entered them.

The page below is from the competencies section of a criteria document. It shows how criteria items can be added or removed from a section. Behavior sub-items can also be modified on this document.



Modifying Competencies

Multisource Functionality (360-Degree and Multirater Capabilities)

With ePerformance 8.9, individuals other than the manager and employee can provide direct feedback into an employee's performance or developmental evaluation or document. Additional roles such as peers, direct reports and mentors can be easily defined and utilized in the business process.

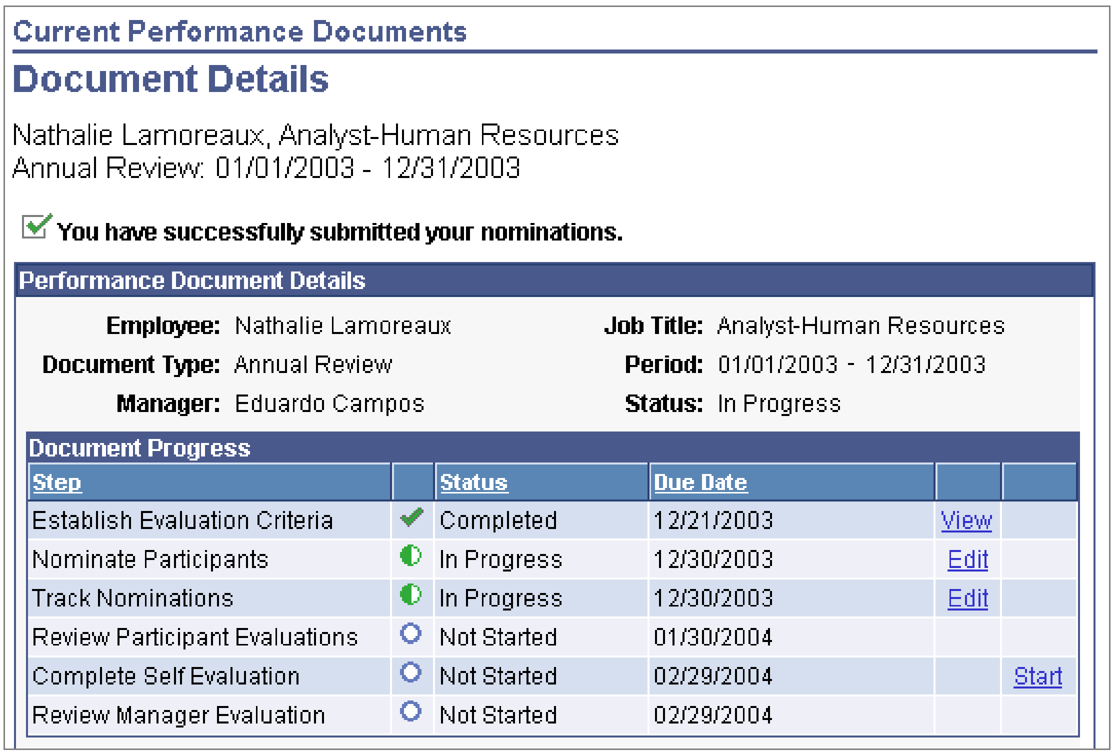
The new functionality for enabling multisource evaluations consists of several new or expanded business process steps.

These steps are:

- **Nominate Participants** enables the manager and employee to nominate participants to provide feedback on employee performance.
- **Track Nominations** enables the manager and employee to track the status of participant's nominations.

- **Review Participant Evaluations** enables the manager and employee to track and view the feedback from the nominated participants.
- **Complete/Review Employee Self Evaluation** enables the manager to review an employee's self-evaluation after the employee completes it.
- **Complete/Review Manager/Mentor Evaluation** enables the manager to complete an evaluation for the employee, which the employee can then (optionally) review. If the document process supports multi-participant feedback, the manager consolidates the ratings and comments from other participants into the manager's evaluation before the employee reviews it.

Using a page that displays a picture of the document's progress through these steps, the manager and employee can view the applicable steps of the business process at any time and view the actions that they can take and results for the steps displayed.



Current Performance Documents

Document Details

Nathalie Lamoreaux, Analyst-Human Resources
Annual Review: 01/01/2003 - 12/31/2003

You have successfully submitted your nominations.

Performance Document Details

Employee: Nathalie Lamoreaux
Job Title: Analyst-Human Resources
Document Type: Annual Review
Period: 01/01/2003 - 12/31/2003
Manager: Eduardo Campos
Status: In Progress

Document Progress

Step		Status	Due Date		
Establish Evaluation Criteria		Completed	12/21/2003	View	
Nominate Participants		In Progress	12/30/2003	Edit	
Track Nominations		In Progress	12/30/2003	Edit	
Review Participant Evaluations		Not Started	01/30/2004		
Complete Self Evaluation		Not Started	02/29/2004		Start
Review Manager Evaluation		Not Started	02/29/2004		

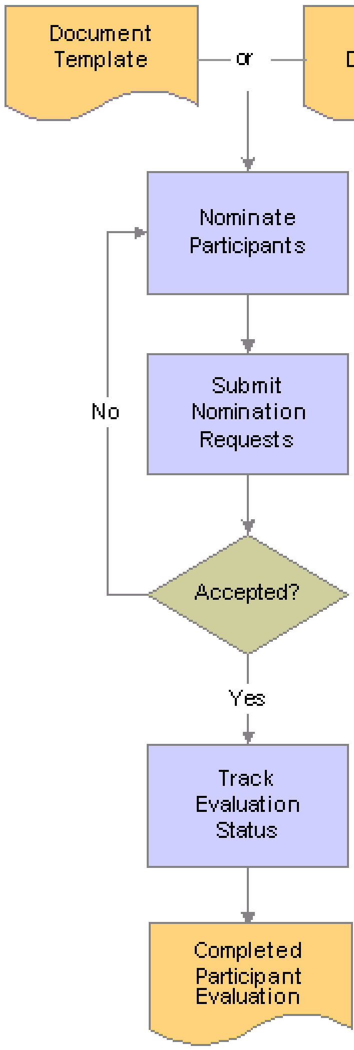
Document progress

Additional features of the template definition are available to support these new processes and to define the rules for how various roles interact with the process.

Nominations

One of the most significant new features is the nomination process. For the first time, roles other than the employee and manager can be directly included within the performance process.

This diagram depicts the multi-participant process:

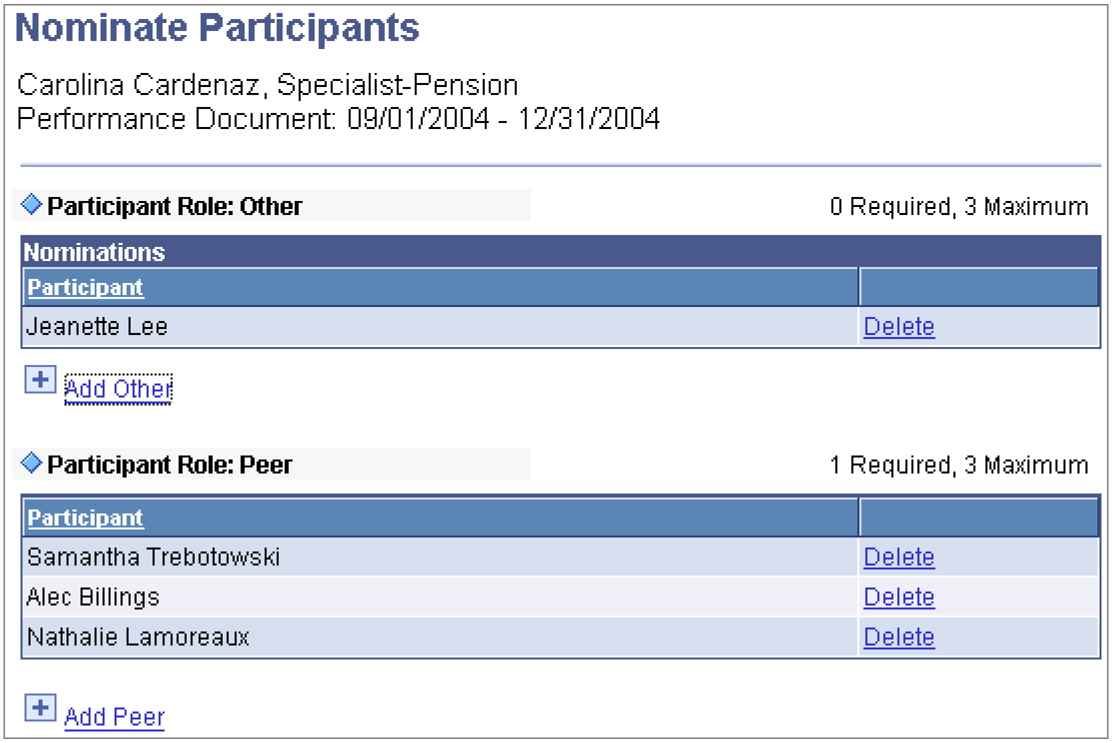


Multi-Participant Process

Before the Nominate Participants step can be started, a completed criteria document must exist. If the Establish Criteria step is not required, the document template criteria are used.

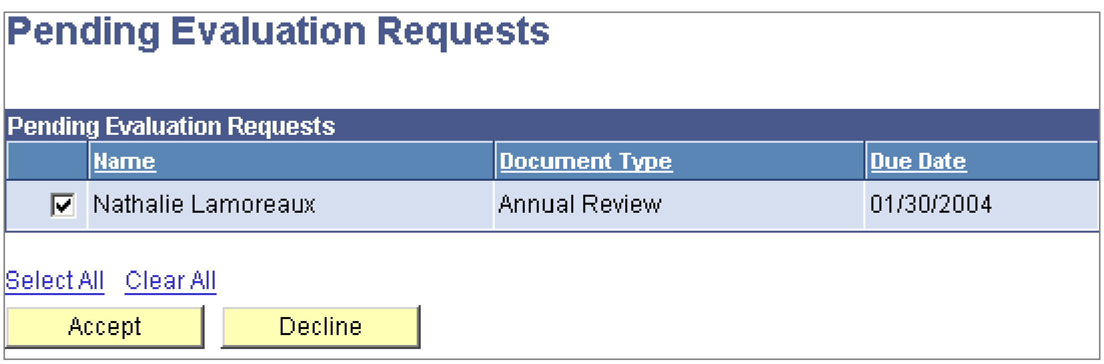
The Nominate Participants step enables the manager and employee to nominate a list of individuals that they want to have included in the employee's performance or developmental process. Based on the template setup, the manager and the employee can add these individuals as nominees. The template also determines which role (manager or employee) can submit the nominations to the nominees and which role (manager or employee) can track the status of the nominations after they have been submitted to the nominees.

This is the page that is used to nominate participants:



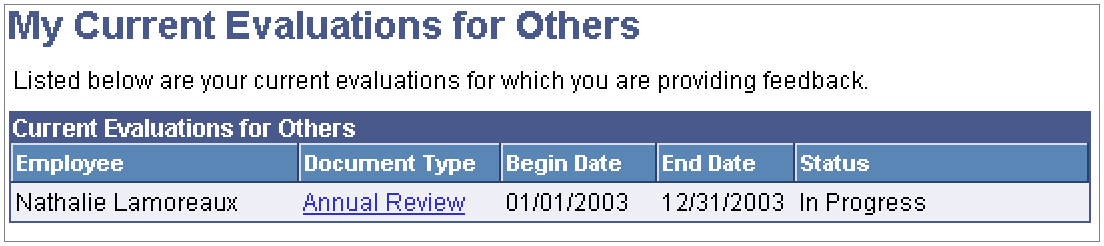
Nominating Participants

After the nominations have been submitted to the nominee, the nominee can accept or decline the nomination. Employees use the Pending Evaluation Requests page to view their evaluation requests and accept or decline nominations.



Displaying pending evaluation requests

After a nominee accepts the nomination, a participant evaluation is created for them and appears on the My Current Evaluations for Others page:



My Current Evaluations for Others

Listed below are your current evaluations for which you are providing feedback.

Current Evaluations for Others

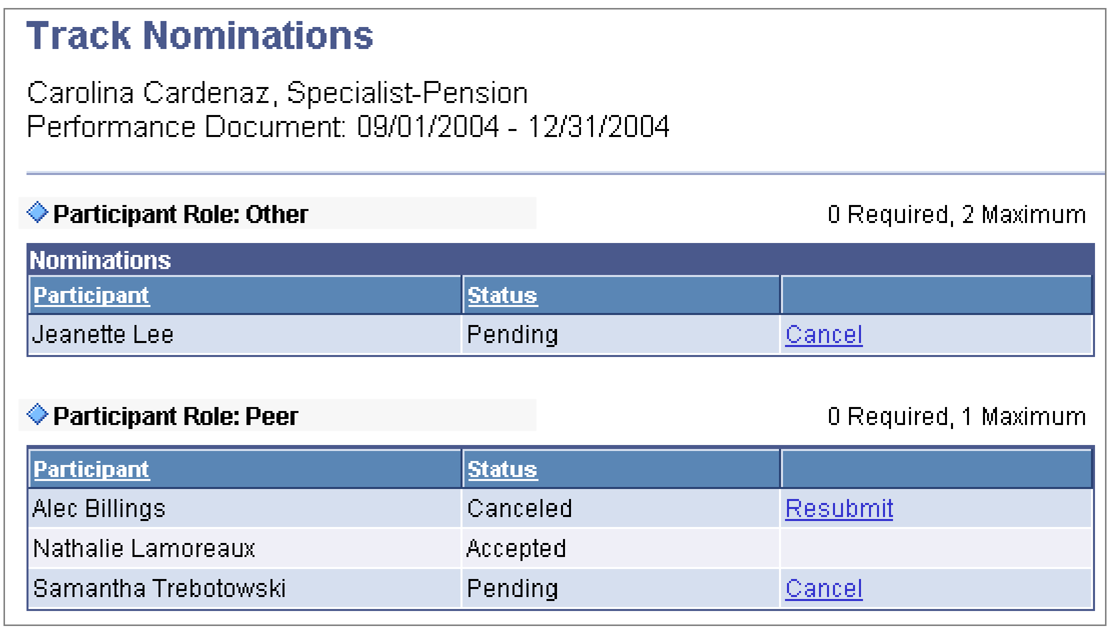
Employee	Document Type	Begin Date	End Date	Status
Nathalie Lamoreaux	Annual Review	01/01/2003	12/31/2003	In Progress

Displaying current evaluations for others

Multi-Participant Features

Several new optional features exist to support the nomination process. These features are enabled on the document template page where you define document process:

- Ability for the manager or employee to track the nominated reviewers' progress.



Track Nominations

Carolina Cardenaz, Specialist-Pension
Performance Document: 09/01/2004 - 12/31/2004

Participant Role: Other 0 Required, 2 Maximum

Nominations

Participant	Status	
Jeanette Lee	Pending	Cancel

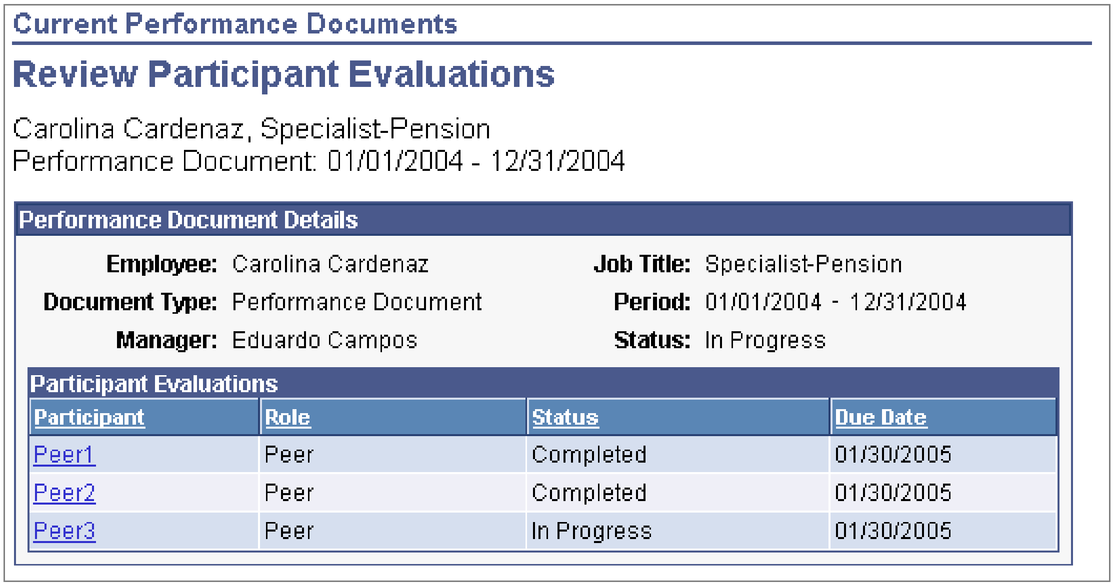
Participant Role: Peer 0 Required, 1 Maximum

Participant	Status	
Alec Billings	Canceled	Resubmit
Nathalie Lamoreaux	Accepted	
Samantha Trebotowski	Pending	Cancel

Tracking submitted nominations

- Ability to establish a minimum and maximum number of nominations.
- Anonymous or named feedback can also be selected as a feedback rule.

After nominations are accepted, the manager or employee uses the Review Participant Evaluations page to track the status of reviews and drill down to view an evaluation, if enabled for this functionality on the document template.


Current Performance Documents

Review Participant Evaluations

Carolina Cardenaz, Specialist-Pension
Performance Document: 01/01/2004 - 12/31/2004

Performance Document Details

Employee:	Carolina Cardenaz	**Job Title:**	Specialist-Pension
Document Type:	Performance Document	**Period:**	01/01/2004 - 12/31/2004
Manager:	Eduardo Campos	**Status:**	In Progress

Participant Evaluations

Participant	Role	Status	Due Date
Peer1	Peer	Completed	01/30/2005
Peer2	Peer	Completed	01/30/2005
Peer3	Peer	In Progress	01/30/2005

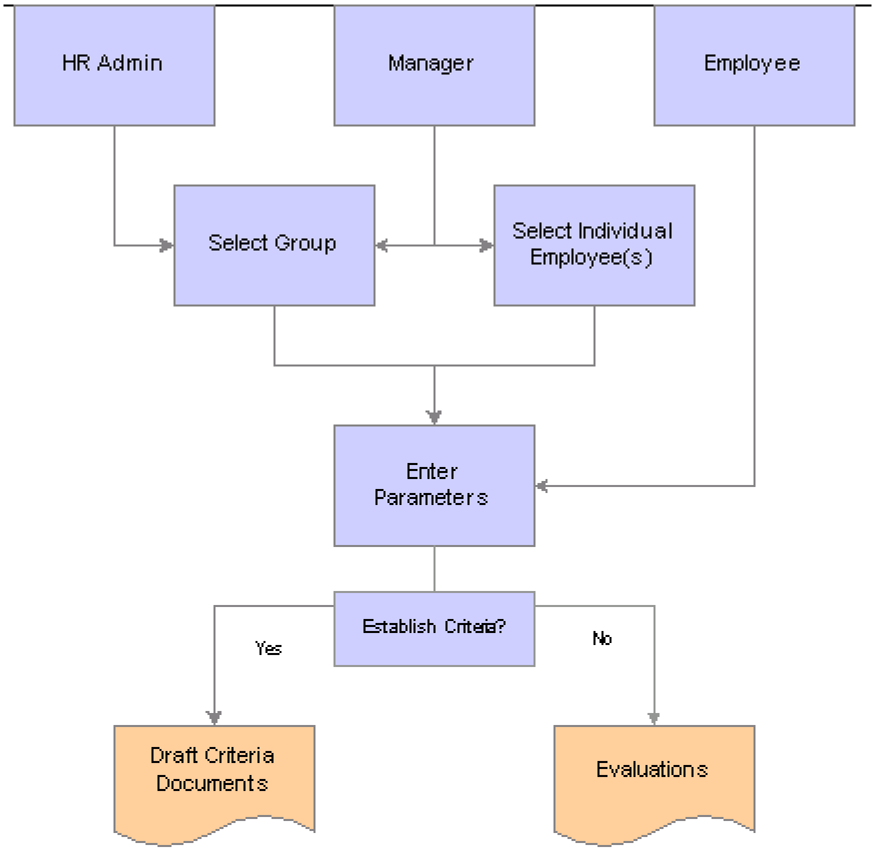
Displaying the status of participant evaluations

In this case, anonymity for the participant was selected; therefore, the participants' names are replaced with the role name and a sequence number (Peer1, Peer2, etc.)

Employee-Initiated Performance Process

Some organizations derive optimal performance feedback and results by deploying employee-initiated and employee-managed performance processes. In ePerformance 8.8, only the manager or HR administrator role could initiate and complete the performance process. Based on customer feedback, ePerformance 8.9 offers options to enable employees to launch the performance process and define the criteria within the performance document.

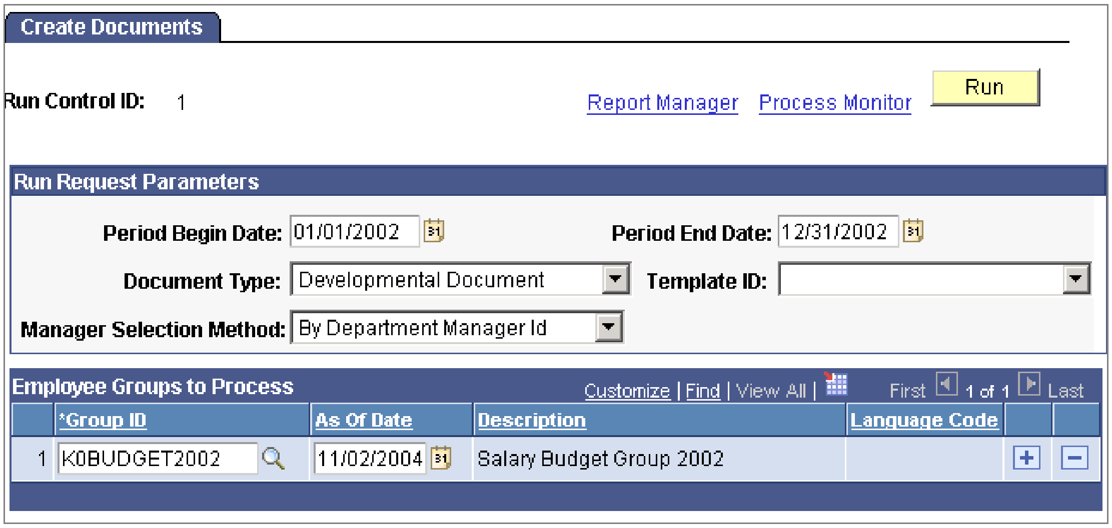
Organizations can configure the method that best fits their needs. The HR Administrator, manager, or employee can initiate the creation of a performance or development document, as shown in this diagram:



Creating documents process

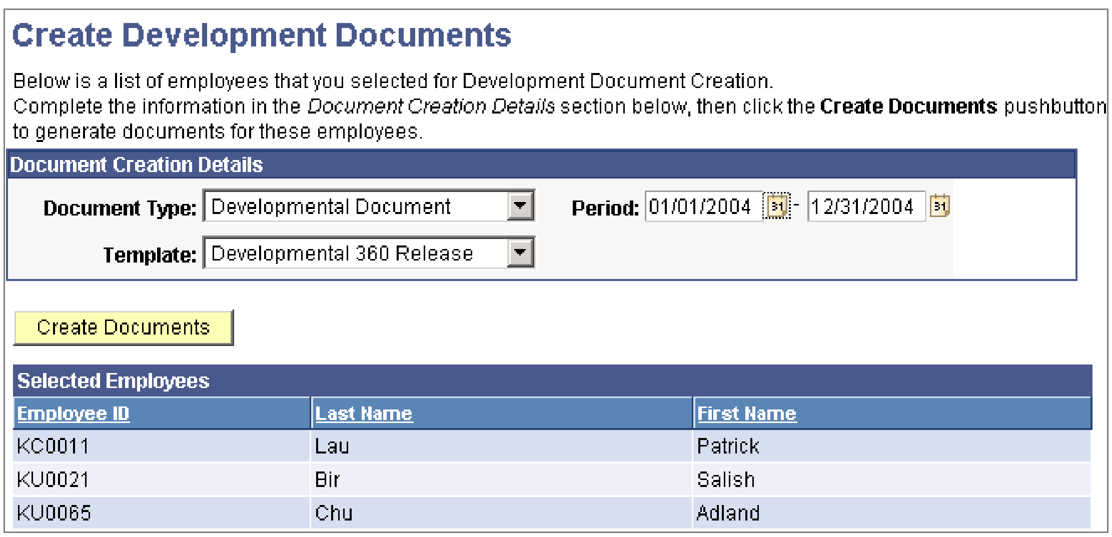
HR Administrators create documents for groups of employees using a batch process; managers create documents either for a single group of employees that reports to them or for one or more of their direct reports. Employees can only create documents for themselves. The document creator must select a document type and, if applicable, a document template from which to create the document(s) and a time frame that the document covers.

HR Administrators use the Create Documents page to initiate a batch process to create documents:



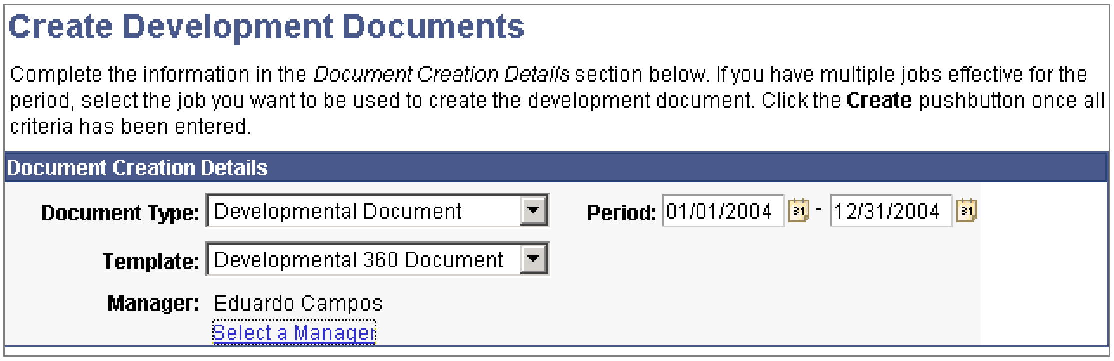
Creating documents as an HR administrator

Managers use a series of pages to select the employees or groups for which to create documents and submit the process, which is run online in the background.



Creating documents as a manager

Employees enter the same document creation parameters; however, instead of selecting groups or employees for whom to generate evaluations, the employee can choose the individual they want to act in the manager role for the evaluation, if this capability is defined for the document type.



Creating documents as an employee

From there, if the Establish Criteria step is enabled on the document template, the employee or manager updates the performance criteria, where applicable, before starting the performance evaluation process. This new functionality reduces the time that is needed to update criteria because only a single document is used to determine the content to be evaluated. If the Establish Criteria step is not enabled, the individual evaluations are generated when the employee or manager begins work on the evaluation.

The ability for employees to initiate the evaluation process and to have input into establishing evaluation criteria are invaluable to matrix organizations or organizations in which the work environment is characterized by multiple projects or reporting relationships within defined performance cycles.

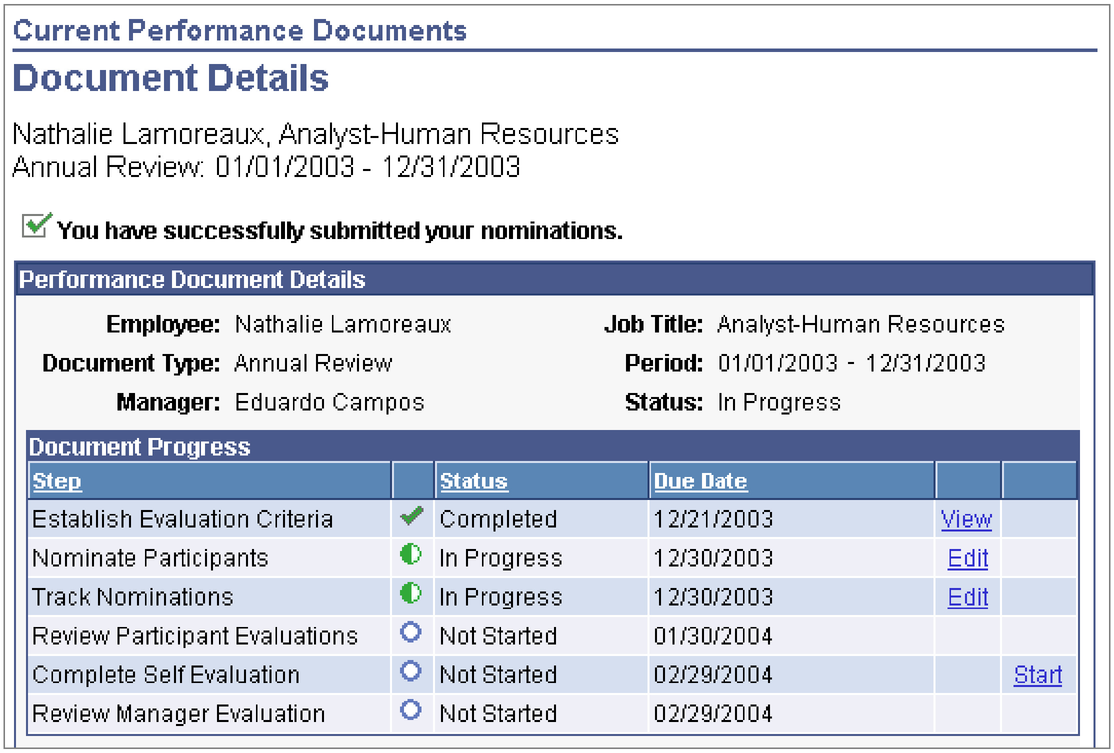
User Interface Enhancements

In some organizations, managers access performance documents infrequently and employees make updates as infrequently as once or twice a year. It is therefore critical that the user interface be as intuitive as possible, particularly if a multisource feedback process is in place. The very success of the performance process can be measured by its perceived ease of use.

In ePerformance 8.9, when users access an active document, they see all of the steps (and their status) that are defined for their role on that document. This new user interface provides instant insight into the performance document and pinpoints the steps that are required, as well as the status for each. The employee and manager can quickly and easily track the stage of completion against this easy-to-use grid.

This page shows the document progress grid for a document that has the Establish Criteria and Multi-Participant features enabled:

Note. This is the same Document Progress grid that was shown earlier to illustrate the evaluation process steps.


Current Performance Documents

Document Details

Nathalie Lamoreaux, Analyst-Human Resources
Annual Review: 01/01/2003 - 12/31/2003

You have successfully submitted your nominations.

Performance Document Details

Employee: Nathalie Lamoreaux **Job Title:** Analyst-Human Resources
Document Type: Annual Review **Period:** 01/01/2003 - 12/31/2003
Manager: Eduardo Campos **Status:** In Progress

Document Progress

Step		Status	Due Date		
Establish Evaluation Criteria		Completed	12/21/2003	View	
Nominate Participants		In Progress	12/30/2003	Edit	
Track Nominations		In Progress	12/30/2003	Edit	
Review Participant Evaluations		Not Started	01/30/2004		
Complete Self Evaluation		Not Started	02/29/2004		Start
Review Manager Evaluation		Not Started	02/29/2004		

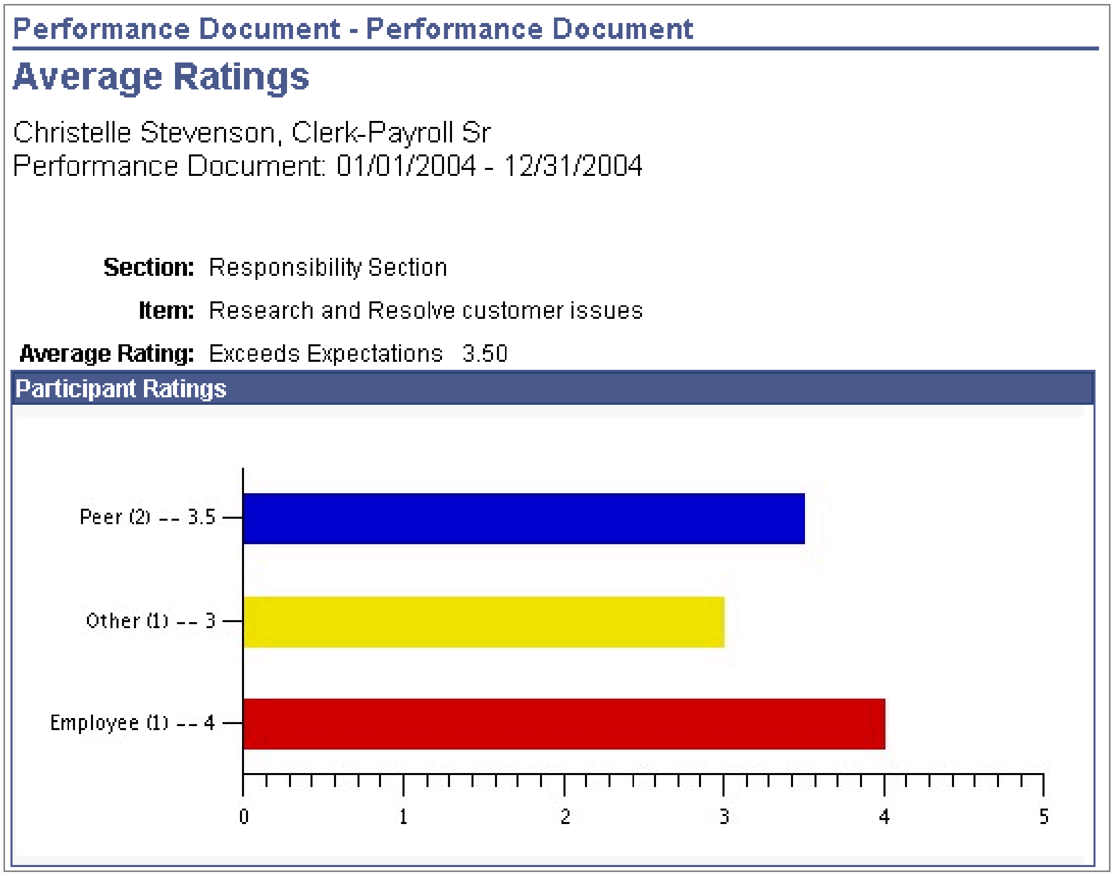
Document progress

Users know immediately what the required actions are, their status, and their due dates. They have the necessary links to complete the task or to initiate workflow to notify others on what is required to keep the process moving forward. This page is entirely configurable and easy to implement with the ePerformance template design.

In addition to improving the accessibility of documents, the look and feel of evaluations has been modified to deliver a document that is more user-friendly.

Finalizing Reviews

When finalizing reviews, managers can drill down into summarized ratings. For example, if a section rating is the average of multiple items, the manager can view the rating for each item and drill down further to see the rating from each participant role.

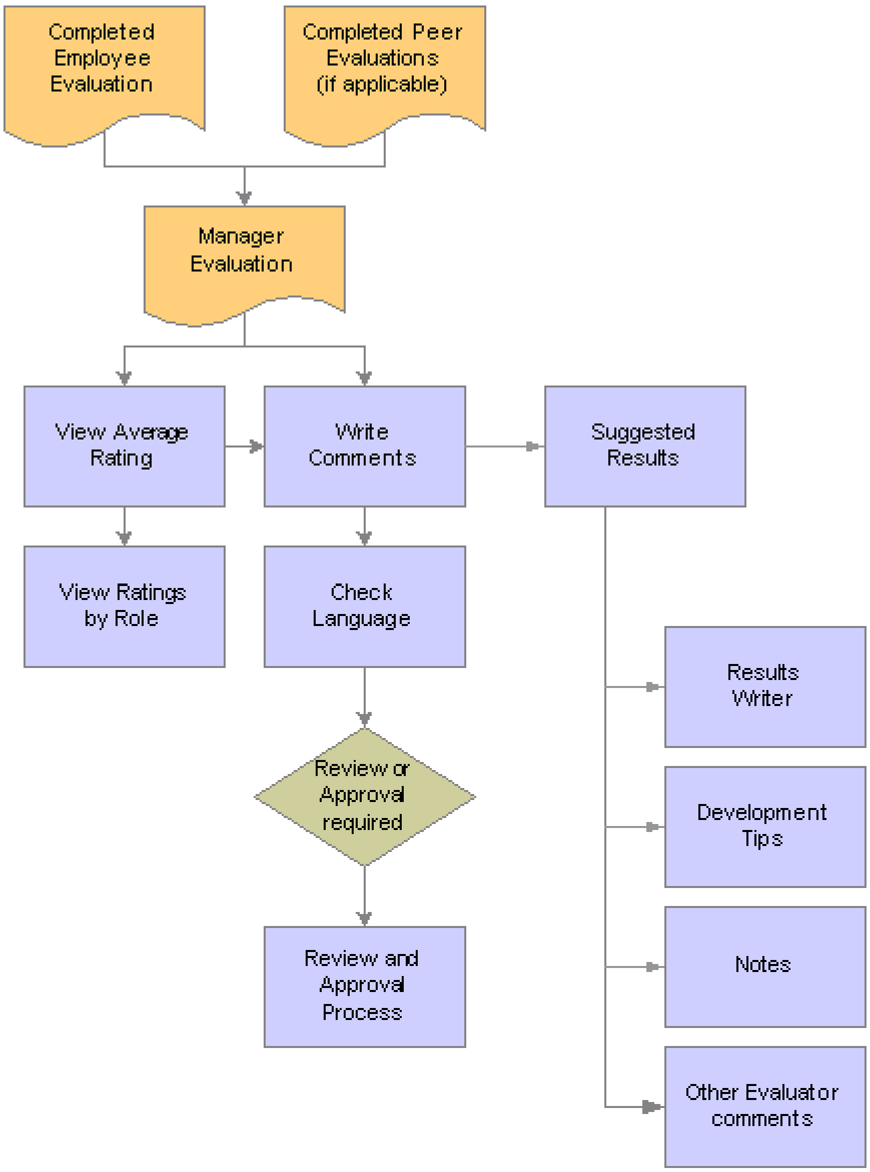


Summarized ratings

There are similar usability changes throughout the application. ePerformance 8.9 requires fewer clicks for the users to access what they need, and to complete an action.

The process for finalizing reviews includes not only the ability to view summarized ratings, but also tools to incorporate feedback from all participants into the manager’s evaluation.

This process is shown below:



Finalizing Evaluations process

Enhanced Writing Tools

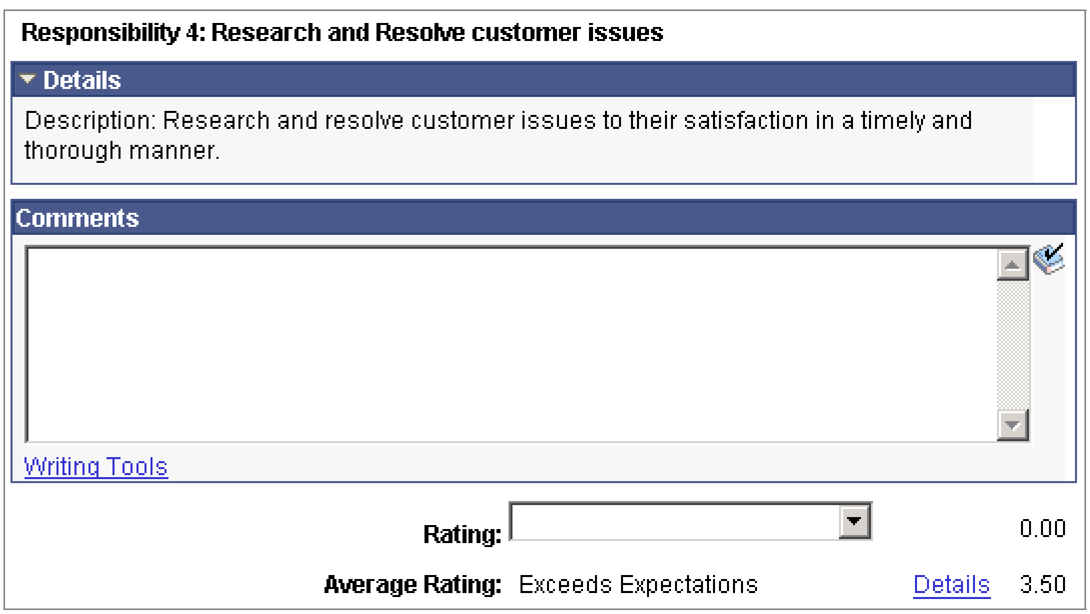
Organizations do not always have the time to adequately train managers or administrators in the optimal approaches or content requirements for the performance processes that they must complete. This is especially true for text and comments that are meant to encourage employee success and improve performance. Without guidance, this input can detract from, rather than improve, the performance process.

ePerformance 8.9 provides solutions to these business challenges. Writing tool enhancements expand on the success of the Advisor Tools (Results Writer, Development Tips, Language Sensitivity Checker, and Spell Checker) provided within ePerformance 8.8. Enhancements enable roles other than the manager to access and incorporate feedback from these integrated performance self-help tools. This enhancement delivers more professional performance processes, greater consistency across the organization, and greater opportunities to leverage best practice features to all participants in the performance process.

ePerformance 8.9 delivers the following enhancements:

- Managers and employees have access to any performance notes that they captured during the performance period as well as those they entered during the Establish Criteria step, and managers can quickly import comments from other participant evaluations.

- The Writing Tools (Results Writer, Development Tips, Performance Notes, and Other Evaluator Comments) are accessible from each Comments field on the performance evaluation. Comments fields can be defined for either the section or item level.

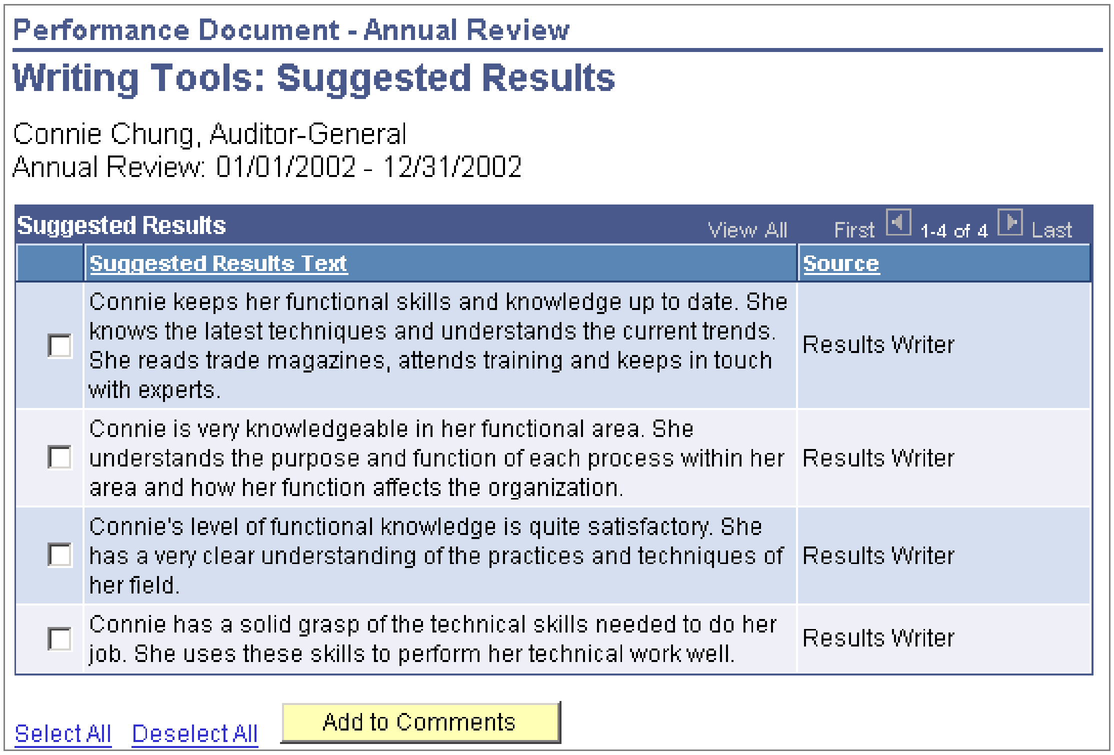


Writing tools enabled at the item level

- A new interface allows the user to quickly select from one page the suggested text for any Writing Tool that is enabled on the template.

  When the user accesses the writing tools, a page displays containing all suggestions that meet the criteria for the section or item that the user is currently working on. These can come from any or all of the writing tools that are enabled for the section or item. The user can then select one or more text items to include in their own comments.

The page shown here lists text items from the Results Writer tool:



Selecting from suggested results

If applicable development tips, notes, or other evaluators' comments were found for the section or item, they also would appear in the Suggested Results grid.

- If necessary, the user can also expand a search within a specific writing tool from the Suggested Text page.

Ability to Delete Documents

It is important to protect information in the performance process. ePerformance 8.9 both incorporates privacy and confidentiality into the process to ensure fairness and to meet organizational and certain legislative requirements establishes safeguards to prevent accidental loss or intentional destruction of data or information. Expanded security and data management actions for administrators and managers enable them to easily access and review documents.

The need to delete performance documents that were incorrectly created is also a valid business requirement. Previously, the HR Administrator or manager had the ability to cancel performance documents, but not the ability to delete documents from the system. The template design in ePerformance makes it possible to create performance documents that may never be used. With ePerformance 8.9, cancelled documents can be purged from the system.

Improved Administrative Capabilities

The easier the system is to use, the greater the opportunities for success. A series of changes in ePerformance 8.9 significantly improves the overall administration and operation of the application for all users.

Ease of Accessing Documents

The ePerformance 8.8 page design displays all subdocuments (both manager and employee documents) in any status in one grid and does not group sets of subdocuments together under one overall document header. With multisource functionality in ePerformance 8.9, additional role documents add more complexity to the display of subdocuments in one grid.

To improve usability, document access for managers, employees, and other participants has been redefined into a two-step process. Document lists are now separated by document purpose, performance or development. Within each purpose, document lists are further refined into two lists by document status, current or historical. Only completed documents display on the historical document list.

Current Development Documents

Listed below are the current development documents for which you are the Manager.

Development Documents

Employee	Document Type	Begin Date	End Date	Job Title	Status
Adland Chu	Developmental Document	10/01/2004	12/31/2004	Clerk-Payroll Sr	In Progress
Adland Chu	Developmental Document	01/01/2004	12/31/2004	Clerk-Payroll Sr	In Progress
Christelle Stevenson	Developmental Document	10/01/2004	12/31/2004	Clerk-Payroll Sr	In Progress
Patrick Lau	Developmental Document	01/01/2004	12/31/2004	Specialist-Payroll	In Progress
Salish Bir	Developmental Document	01/01/2004	12/31/2004	Analyst-Financial	In Progress
Susan Hoinck	Developmental Document	10/01/2004	12/31/2004	Analyst-Business	In Progress

Current development documents for a manager

This enables the employee or manager to easily find and access the documents they wish to view or update. When employees or managers select a document, they are presented with the Document Details page (shown earlier); which contains a detailed list of the steps that are enabled for the document, the status of each step, and a link to the page on which they can view or edit the step details.

At times, a higher-level manager may want to view performance or development documents for indirect reports. ePerformance 8.9 provides managers with the ability to drill down through their reporting hierarchy to view documents for any employee that indirectly reports to them.

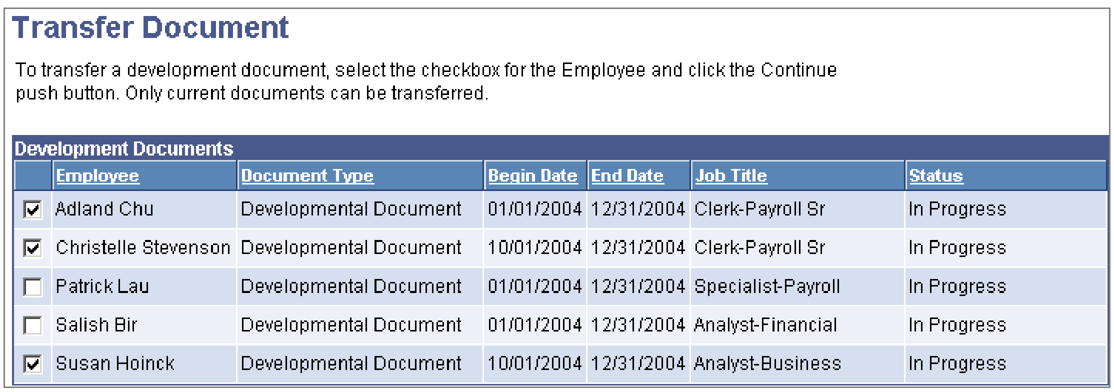
Administrators access performance or development documents by entering search criteria and selecting the document(s) they want to view from the search results. Administrators cannot edit the content of performance or development documents, but can only perform administrative tasks for documents.

Integrating All Rating Calculation Methods to Base Compensation and Budgeting (formerly Plan Salaries)

All rating calculation methods (Average Calculation Method, Summation, and Review Band) on performance documents are integrated into the base compensation and budgeting business process in HRMS 8.9. This integration is configurable and includes single sign-on capability. The user can directly view the calculation from ePerformance within the correct field in the Base Compensation and Budgeting pages of PeopleSoft Enterprise Human Resources.

Multiselect for Administrative Tasks: Cancel, Transfer, Change Status, Enter Preliminary Ratings

This feature enables the user to select multiple documents to process at once. This capability is available for canceling documents, transferring documents, changing the status of documents, and entering the preliminary ratings. For example, the manager can select all documents that need to be transferred to a new manager. In ePerformance 8.8, the manager had to select each document and then enter the new manager for each document. By using the new selection page in ePerformance 8.9, the manager can select multiple documents and then transfer them all with a single action to the new manager.



Transfer Document

To transfer a development document, select the checkbox for the Employee and click the Continue push button. Only current documents can be transferred.

Development Documents

	Employee	Document Type	Begin Date	End Date	Job Title	Status
☑	Adland Chu	Developmental Document	01/01/2004	12/31/2004	Clerk-Payroll Sr	In Progress
☑	Christelle Stevenson	Developmental Document	10/01/2004	12/31/2004	Clerk-Payroll Sr	In Progress
☐	Patrick Lau	Developmental Document	01/01/2004	12/31/2004	Specialist-Payroll	In Progress
☐	Salish Bir	Developmental Document	01/01/2004	12/31/2004	Analyst-Financial	In Progress
☑	Susan Hoinck	Developmental Document	10/01/2004	12/31/2004	Analyst-Business	In Progress

Multiselect for transferring documents

You can cancel a series of documents at once in the same manner. Similar pages exist for entering preliminary ratings (manager only), changing document status, and deleting documents.

Notifications

ePerformance 8.9 includes many new notifications to directly support the new multisource functionality. These notifications save time, improve efficiency, and streamline the performance cycle within any organization. Examples include:

Notification	Purpose
Employee initiates performance process	Notify manager
Employee completes performance criteria	Notify manager
Manager completes performance criteria	Notify employee
Manager submits nominations to nominees	Notify nominees

Notification	Purpose
Participants complete their evaluations	Notify trackers
Return document to participants for rework	Notify participants

Integration

One key advantage of an integrated solution is that your organization is no longer responsible for building and supporting your own custom enterprise integration points, including integration between ePerformance and other PeopleSoft business solutions, as well as third-party integration. For example, additional third-party certified integrations for ePerformance include PeopleSoft's latest ePerformance partner, Development Dimensions International (DDI). This is in addition to PDI (Personnel Decisions International) and Lominger. ePerformance delivers both standard and generic integration points to support organizations that plan to leverage data from multiple sources within and outside PeopleSoft.

Through integration with a broad suite of workforce performance and development applications, organizations can link performance evaluations and assessments to workforce plans, individual career plans, development, learning management rewards, and reporting. Organizations no longer have to choose between the rich functionality of a niche vendor and the broad integration of a large enterprise resource planning (ERP) vendor. PeopleSoft's integrated suite of products, designed to increase workforce performance, delivers out-of-the-box business process integration, superior technology, and the ability to store and share all workforce data in a single application.

Optimize, Track, Monitor Enhancements

The ongoing challenge of doing more with less is forcing companies to streamline their workforce processes. Successful organizations optimize, track, and monitor their workforce to gain unprecedented efficiency in real time. They optimize their global workforce by placing the right people in the right jobs at the right time. They track every aspect of workforce deployment through accurate and relevant management and compliance reporting, and they monitor organizational performance so that they can adjust and adapt. PeopleSoft solutions help our customers plan, measure, and control costs by defining consistent processes and best practices across global boundaries.

What makes PeopleSoft unique in this arena? No alternative delivers PeopleSoft's range and depth of solutions for improving productivity and reducing operational costs. Whether your workforce management processes are centralized at global headquarters or managed by regional offices, PeopleSoft's inherent flexibility offers rich functionality and configurable workflow to streamline business processes in one global system. From workforce management to time collection, payroll management, and self-service, PeopleSoft delivers best-in-class functionality integrated with the industry's leading human capital management applications, rich reporting, and analytical decision-making tools—all within a flexible, role-based workforce portal. The result is lower operational costs and an empowered staff that can perform routine business activities more efficiently.

With PeopleSoft, **National Geographic** has:

- Consolidated infrastructure platform from 15 to three servers.
- Reduced its business systems budget by $1.2 million.
- Achieved $700,000 in savings from PeopleSoft Enterprise Time and Labor over five years.

Merck has:

- Decreased global headcount report cycle time from four to six weeks to 24 hours.
- Provided access to accurate, comprehensive information on headcount, turnover, employee activity, diversity, compensation, and staffing.
- Enabled managers with quick-view scorecards that measure progress against strategically aligned human capital metrics.

Staples has:

- Reduced cost per paycheck significantly compared to outsourced payroll.
- Reduced headcount in corporate HR.
- Eliminated duplicate data entry.

- Deployed software in stores without large expenses for new hardware or additional bandwidth.

What's New in PeopleSoft Enterprise Human Resources 8.9?

PeopleSoft Enterprise Human Resources is PeopleSoft's flagship product. It is the acknowledged leader in functional range and depth covering the entire employee life cycle. It includes feature-rich, global modules; comprehensive reporting; and extensive employee and manager self-service.

Human Resources increases productivity by connecting people to delivered business processes that represent HR industry best practices. It automates common administrative tasks and enables HR departments to focus on managing the most important assets of their organization—their people.

For many companies, managing critical workforce information has become an increasingly complex challenge. Internal pressures, such as the demand for global reporting or the need to cut system maintenance costs, are leading companies to consolidate their core business applications and eliminate secondary or redundant systems. External pressures for corporate accountability and transparency also add to the complexity of data management. Companies are consolidating systems to reduce the risks associated with conflicting or uncontrolled data.

Companies that manage their whole population by using one centralized solution reap rewards such as holistic reporting, global analytics, and higher levels of data consistency and integrity. They may also reduce costs by eliminating secondary systems, maintenance, hardware, and interfaces.

PeopleSoft Enterprise Human Resources 8.9 has these consolidation needs in mind. It enables companies to manage their entire workforce population holistically by using one system of record, regardless of worker classification or geography.

In Human Resources 8.9, we made significant enhancements in the following areas:

- The Person Model.
- Contingent workforce management.
- Person of interest management.
- Configurable search/match.
- Configurable actions and action reasons.
- Flexible row-level security.
- Management by labor agreement.
- PeopleSoft Enterprise HCM Transformation Framework.
- PeopleSoft Enterprise HCM Metadata Repository and Query Builder.

- PeopleSoft Enterprise eProfile Manager Desktop enhancements.
- French enhancements.
- Japanese enhancements.
- Compensation enhancements.

The Person Model

Today's workforce demographics and employment trends are redefining the requirements for HRMS systems. The significant increase in contingent workers (that is, consultants and contractors) demands more sophisticated functionality for centrally tracking a diverse workforce. Workforce management trends that have contributed to information complexity include the growth of contingent worker populations, the need to support the unique needs of salaried and hourly populations in one centralized system, and the increased demand for centralizing global employee information. External pressures, such as corporate accountability requirements, have also convinced many corporate policy makers to maintain only one source of employee information.

In response, PeopleSoft has redesigned the Enterprise HRMS architecture to support the storing and tracking of all person types, including contingent workers and persons of interest, within one centralized repository. This next-generation architecture is an innovative new framework for the consistent tracking of people in the HRMS database. It increases operational excellence by efficiently accommodating rapidly fluctuating workforce dynamics and providing internal visibility and control to critical elements of workforce management. The Person Model is dynamic, delivers highly accurate reporting to support real-time decisions, and ensures that changing business conditions trigger appropriate rapid responses from HR management.

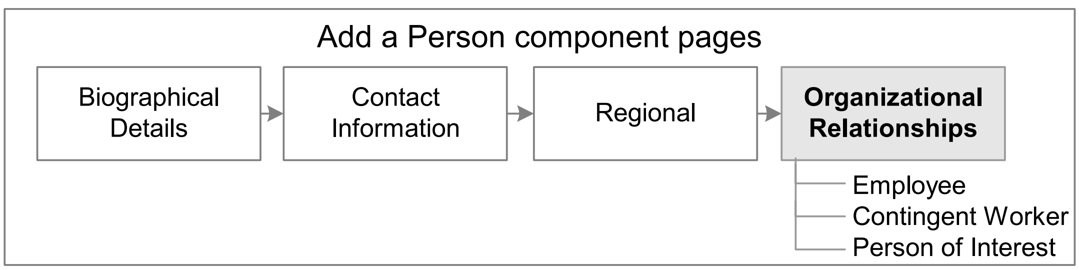
In contrast to previous designs, which focused primarily on the storing and tracking of employees, the new architecture provides a framework for the storing and tracking of all person types—instructors, students, consultants, interns, and board members—within one centralized repository. This new architecture enables personal data to be stored once, with one ID that is retained for the duration of a person's tenure with the organization, regardless of changes to that person's working status.

This architecture evolution provides foundational support for the introduction of several new and improved business processes, including contingent worker management and non-worker management. To further support the new Person Model, we've made enhancements throughout the HCM product family so that all person types can be managed throughout the applications.

Adding a Person

Whether you're adding an employee, contingent worker, or person of interest (POI), you use the same pages to enter personal data and assign the person an identification number to use throughout HRMS. As a person's relationship with the organization changes or grows, you can track them using the same identification number, significantly simplifying and streamlining records management. And by storing personal data in a separate component, you only need to enter and maintain it once regardless of how many jobs a person may hold.

There are four pages in the Personal Data component when you add a person to the HRMS system. On the Biographical Details page, enter biographical information such as name, education level and marital status. Use the Contact Information page to enter addresses, phone numbers, and email addresses. The Regional page enables you to track information required for effective person-management in a variety of countries. You use these same three pages when you maintain the personal information of the people in your system.

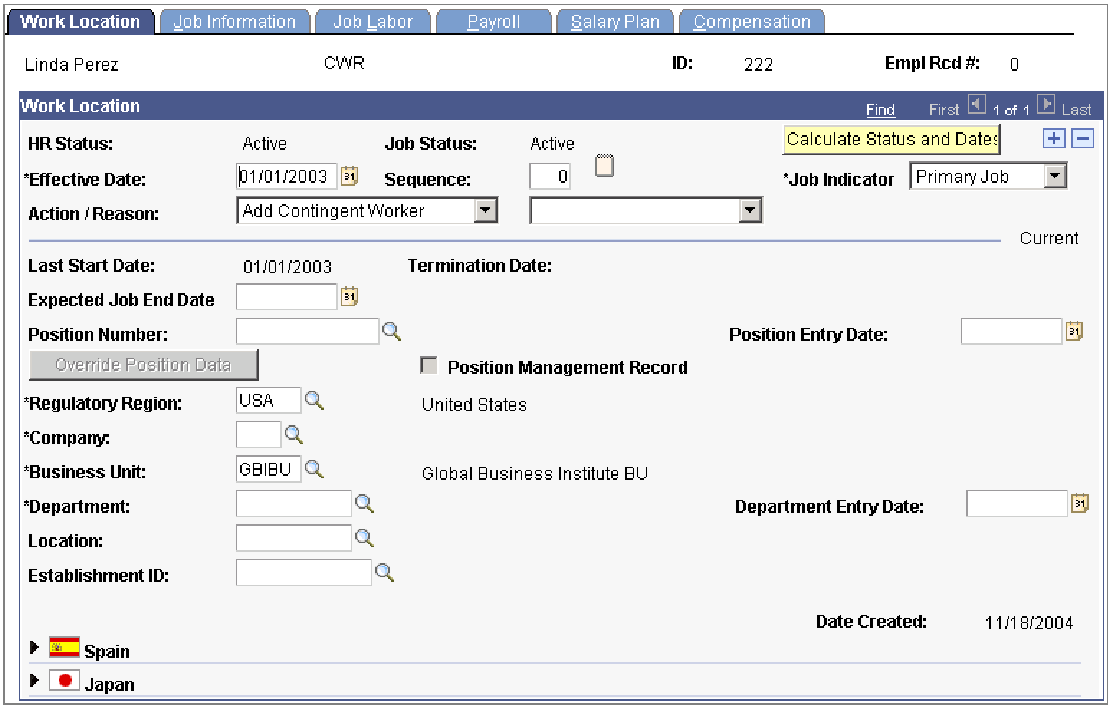


Add a Person pages

The fourth Personal Data page, Organizational Relationships, is only available when you add a person to the system and enables you to select the kind of relationship this person currently has with your organization and to access the appropriate component to enter relationship information.

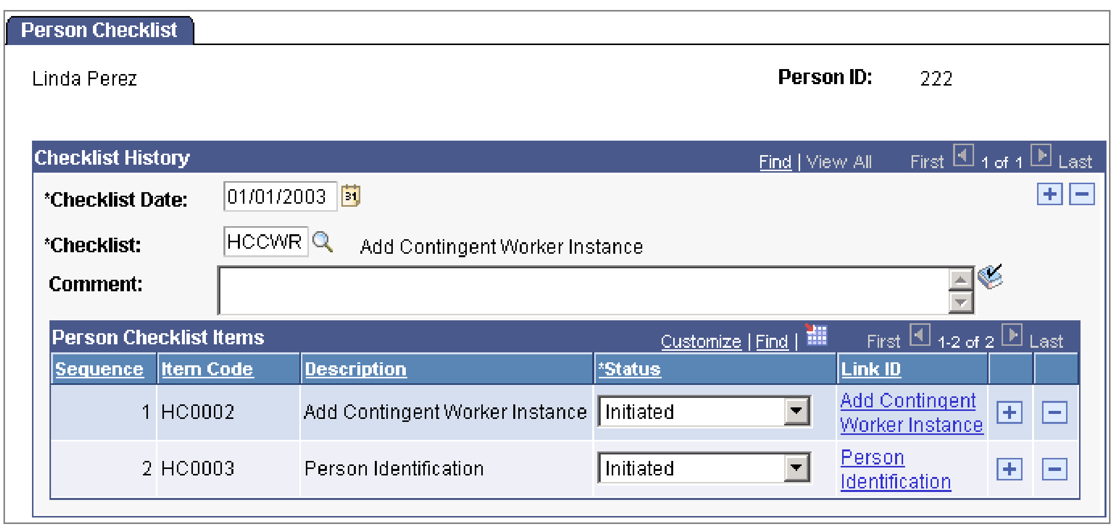
Organizational Relationships page

When you click the Add the Relationship button, the system saves the Personal Data component and moves you to the component you need to use to enter relationship information. For example, if you choose a contingent worker relationship, the system creates a Job Data record for this person, using the ID created on the Personal Data component and the organizational relationship of CWR (contingent worker).



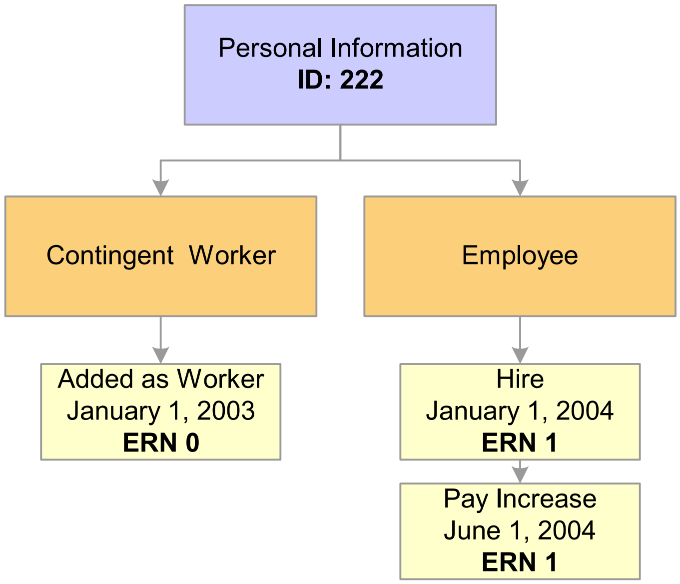
Job Data component for a new contingent worker

You can also associate default checklists with the different relationships so that when you choose a relationship the system automatically creates a checklist record for the person on the Person Checklist page. This enables you to easily track the tasks you need to accomplish when you add a person to your organization and ensures that the right tasks are executed, depending on the type of person added. By having a checklist that is unique to contingent workers you can include only the items that are relevant to them and their role in the organization.



Checklist items for new contingent worker

Once a person is entered in HRMS, you do not need to create their personal information again and they can use the same identification number regardless of how their relationships to the organization change or grow. For example, Linda Perez, who joined GBI as a contingent worker, maintains the same Person ID when she takes on an additional, permanent position as an employee. The system uses employment record numbers (ERN) to distinguish between a person's job data records.



A person has one personal data record and identification number, even when they have more than one job

Employment Record Numbers, Multiple Jobs and the Person Model

Employment record numbers (ERNs), in combination with a person's ID, uniquely identify a person's job data records. In previous releases, you needed to enable Multiple Jobs functionality by selecting the Multiple Jobs Allowed check box on the Installation table in order to use employment record numbers and process multiple Job Data records for a person.

In HRMS 8.9, we've removed the Multiple Jobs Allowed check box and delivered HRMS with the functionality turned on so that the people in your system can have more than one Job Data record (you still need to select the Multiple Jobs Allowed check box on the PeopleTools Options page).

PeopleSoft creates a Job Data record with a unique ERN for a person when you:

- Hire an employee or contingent worker.
- Create a Job Data record for a person of interest.
- Suspend an employee or contingent worker's substantive job and assign them to a temporary assignment.
- Create another job for an employee or contingent worker that is separate from their existing job.

- Create an additional job for an employee or contingent worker that is tied to their existing job.
- Send an employee on a global assignment.
- (JPN) Create an additional assignment.
- (JPN) Create a temporary intercompany transfer.
- (CHE) Create an additional contract.

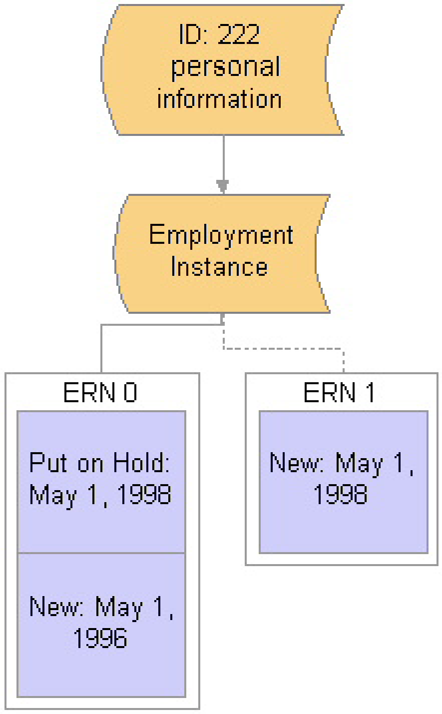
While all of these circumstances result in multiple Job Data records, they do not all result in multiple jobs, as processed by HRMS. A person does not have multiple jobs when they have:

- A contingent worker and an employment instance.
- A substantive job and a temporary job where the substantive job is suspended.

People do have multiple jobs when they have:

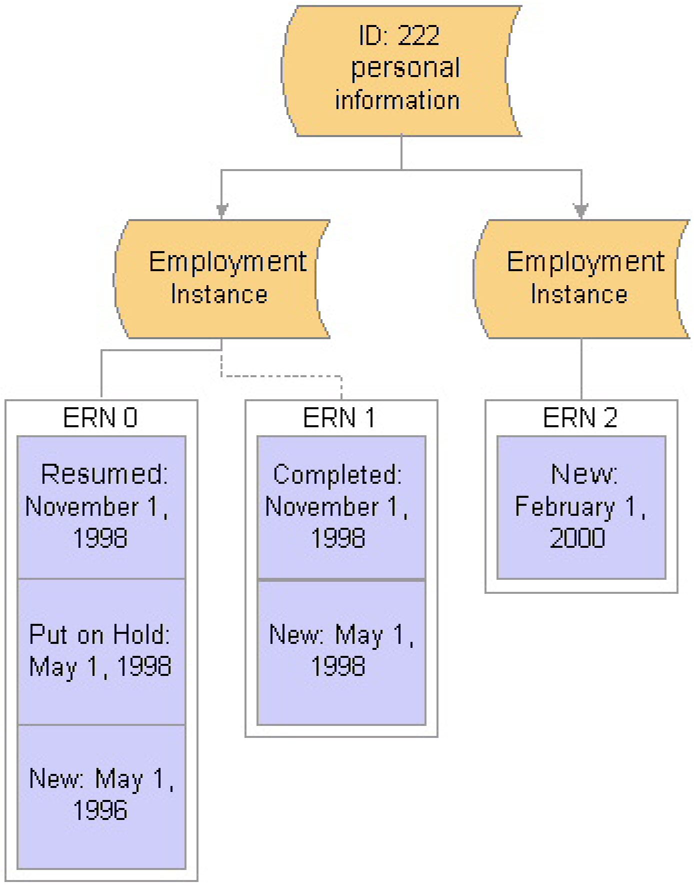
- More than one active contingent worker or employment organizational instance.
- A substantive job and an additional assignment where the substantive job is not suspended.

For example, when you suspend an employee's substantive job and create a new Job Data record for a temporary assignment, the person has two Job Data records, two ERNs, but does not have multiple jobs.



A person can have multiple employment record numbers without having multiple jobs.

However, when you create a new Job Data record for an employee and do not suspend the current job, the person does have multiple jobs.



A person with two active employee job records has multiple jobs.

Contingent Workforce Management

The Advisory Council of the United States Department of Labor recently issued a detailed report that documented the extent to which corporate America is replacing full-time workers with part-time workers, temporary employees, and independent contractors. These workers now make up more than 30 percent of the United States workforce, and their number is growing quickly. Since 1990, the number of workers employed as temporary employees alone has tripled from one million to three million and is expected to quadruple to 12 million over the next ten years.

In HRMS 8.9, employees and contingent workers co-reside in all core business processes. A company's contingent workforce can be managed, and accounted for, alongside its employee population while still maintaining key differentiation.

The following features are included within contingent workforce management.

Recruiting Solutions/Services Procurement for Contingent Workers

Managing a contingent workforce begins with identifying and hiring contingent workers. To support the business process of hiring contingent workers, we've enhanced contingent workforce support within PeopleSoft's Enterprise Recruiting Solutions and Services Procurement.

For example, if a job (or position) within Recruiting Solutions is designated as contingent, the information for the selected candidate is transferred into Workforce Administration as a contingent worker, reducing processing time, manual data entry, and error rates for customers.

HRMS for Contingent Workers

Today's workers may have several relationships with a company, either sequentially or concurrently. Someone may begin working for a company as a contractor and then later become an employee. Someone may leave a company as an employee but be rehired later as a contingent worker. Additionally, someone may be an employee who is also working on a project as a contractor.

With HRMS 8.9, people can seamlessly transition between employee and contingent worker status while keeping the same employee ID. They can be an employee and a contingent worker simultaneously. Complete job history for all instances is kept and easily reviewed in one central location. An enhanced UI and functionality exist to accommodate tracking requirements for contingent workers.

This feature is useful for organizations that frequently transition people between contingent worker status and employment status or for companies in which people frequently hold multiple concurrent statuses.

Payroll Solutions for Contingent Workers

Some companies directly pay contingent workers. Others do not. In HRMS 8.9, companies choose their process. PeopleSoft Enterprise Global Payroll supports contingent workers, employees, or people who are concurrently contingent workers and employees. This enhancement is particularly useful for global companies in which directly paying contingent workers is a common practice. Payroll for North America and Payroll Interface do not pay contingent workers.

Self-Service and Contingent Workers

In today's flexible workforces, it is not uncommon for a contingent worker to manage direct reports or for contingent workers to provide or maintain information via self-service. Because contingent workers are identified with a static employee ID and the same security views as employees, it becomes simpler to include contingent workers as approvers or self-service users. This feature is useful for organizations that want to extend self-service to their contingent workforce or that commonly have contingent workers functioning as managers.

Reporting and Analytics

The rising proportion of contingent workers creates the need to quantify and manage a new and growing population within companies. To effectively support business processes such as space allocation and planning, network security, building security, and true headcount analysis, companies need visibility into their total workforce.

In HRMS 8.9, contingent workers reside alongside employees, simplifying combined reporting. Customers can specify whether to run a report for contingent workers, employees, or both. This feature is useful for companies for which contingent workers constitute a considerable percentage of the workforce.

Search Record Enhancements

For companies to benefit from greater control of their contingent workforce, they need to be able to easily identify and manage the records of contingent workers throughout all their core business processes.

To facilitate access to contingent worker records, the common employee search records used throughout HRMS 8.9 enable searching by employee or contingent worker status. This feature is useful for any company that manages contingent workers.

Persons of Interest Management

Organizations frequently need to store basic information on people who are not workers. They may want to track board members, volunteers, or nonworkers who have security access to buildings or networks. A university may want to monitor who has library access or parking passes. The possibilities are limitless and often unique to an industry or organization. PeopleSoft already stores persons of interest in numerous places within the application. There are instructors, emergency contacts, and many more.

Because the new Person Model architecture allows personal data to be stored once, without job information, and then used for multiple purposes, users can track people within core tables for any reason, without needing a job record.

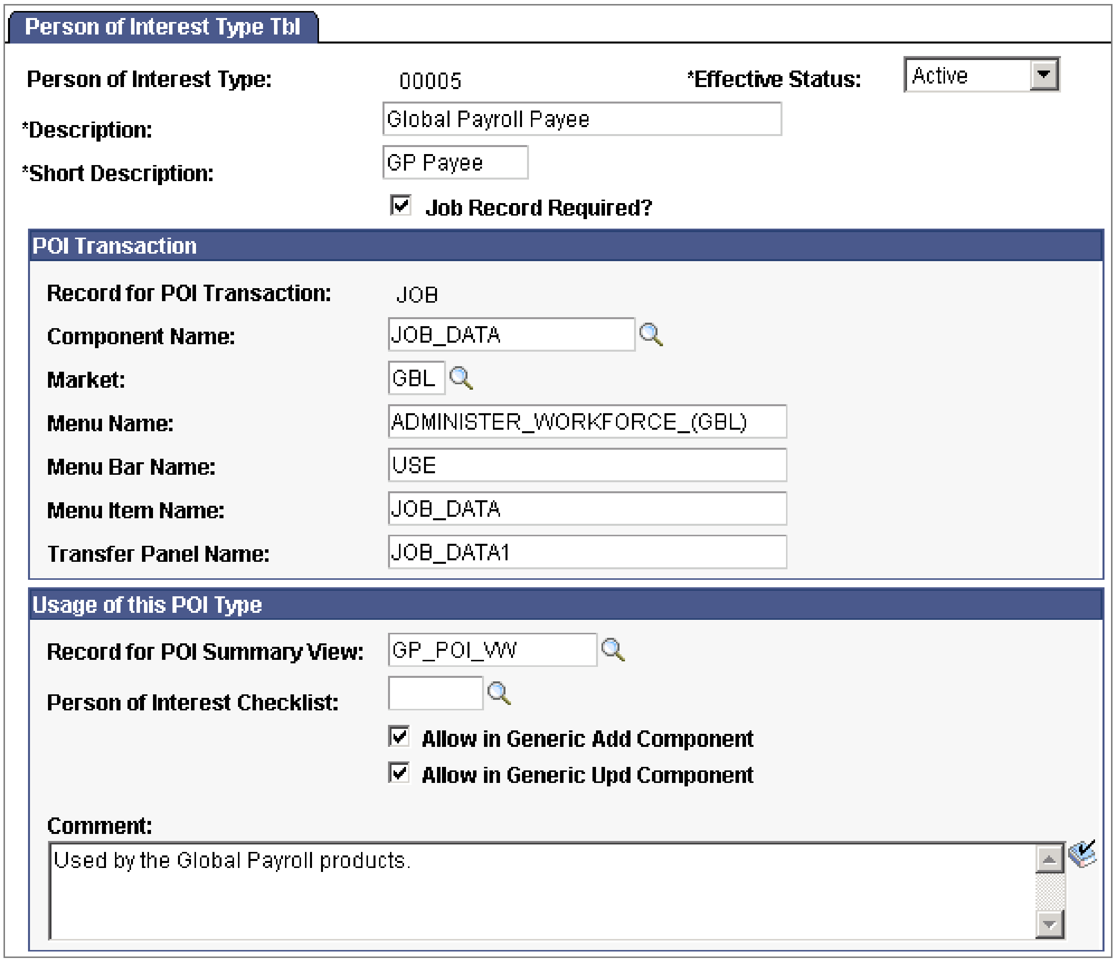
Features for managing persons of interest include the following.

Customer-Defined Relationships

Customers may want to track persons of interest who exist for reasons outside of PeopleSoft. For example, a hospital may want to track basic information about volunteers. A university may want to keep information about visiting professors.

HRMS 8.9 allows customers to define and maintain their own classifications for persons of interest. This feature is useful for customers who have a large number of nonworkers associated with their organizations that they want to track and monitor.

Use the Person of Interest Type Tbl page to create different types of people of interest and enter the settings to control how the types are used in HRMS.



Use the Person of Interest Type Tbl page to define new POI types

You can determine on which components a POI type can be selected and whether the POI type requires a job. For example, the POI type Global Payroll Payee can be selected from the Add a Person component on the Administer Workforce menu and the Add a POI Payee component on the Global Payroll and Absence Mgmt menu. However the POI type Pension Payee is only available in the PeopleSoft Pension Administration components. These options enable you to limit who can add a certain POI type where, increasing your flexibility while reducing chances for user error.

Configurable Search/Match

With the ability to manage multiple relationships between a person and a company, there is a need to prevent a person from being entered into the system more than once.

HRMS 8.9 delivers a company-configurable search and match wherever people can be added into the application. The search results page is also configurable. The search and results configuration enables customers to determine and protect data that they determine to be sensitive.

This feature is valuable for any organization in which people commonly hold multiple jobs or relationships with the company. This feature is also useful for companies that frequently rehire former workers.

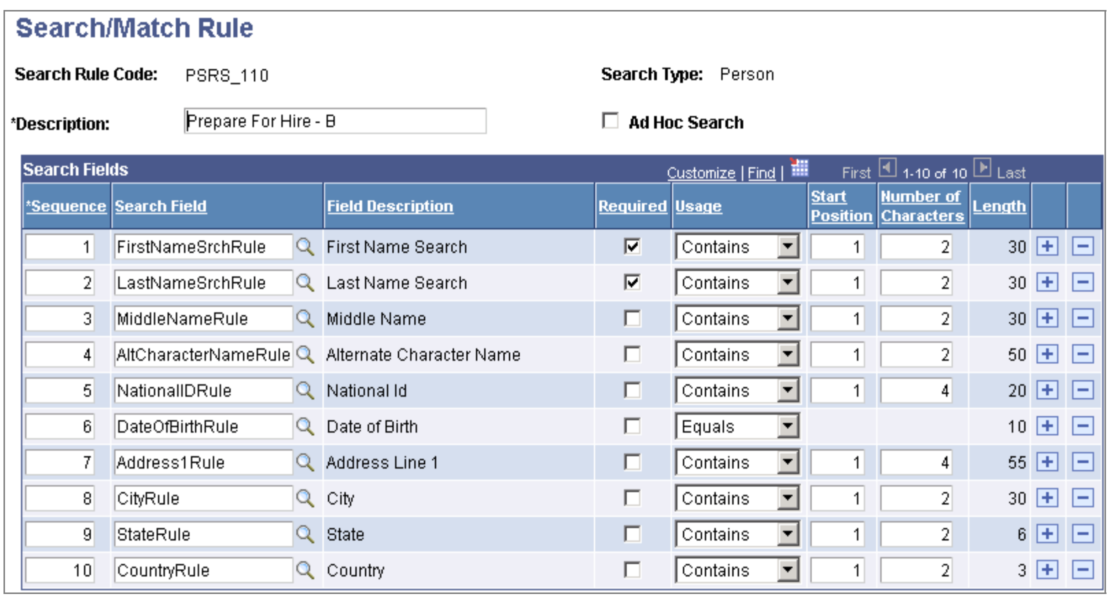
For person IDs and applicants, you can define your own search criteria to perform a search when you add a person to the system. The criteria can include defining search rules and placing them in the desired order within a search parameter. You can also set what data to display in the results to identify a possible matching ID. Set up multiple search result codes and give security access to all users or restrict it to specific users who have a certain security role assigned.

You can also set rules and parameters to permit only ad hoc searches to enable users with the appropriate security to perform ad hoc searches without the constraints of predefined criteria.

You can also enforce the use of Search/Match by setting Search/Match to trigger when a user enters data and saves a new ID by transferring the user directly to the list of IDs that match the criteria. When you enforce Search/Match at save time, the user does not need to navigate to the Search/Match component and reenter the data to determine whether the ID exists.

You define search rules to identify which fields to search for and how to use them to perform the search. You can use one or multiple search rules. If you use multiple search rules, Search/Match applies the rules in the order that you define. Starting with the first rule, if the system finds at least one match according to that rule, it will stop searching. However, if it finds no match for that rule, it will continue to the next rule, and so on.

A search parameter is a set of one or more search rules that you order sequentially with the lowest (or first) search order level as the most restrictive, and the highest (or last) search order level as the least restrictive. A search parameter must be created even if it contains only one search rule.


Search/Match Rule

Search Rule Code: PSRS_110 **Search Type:** Person

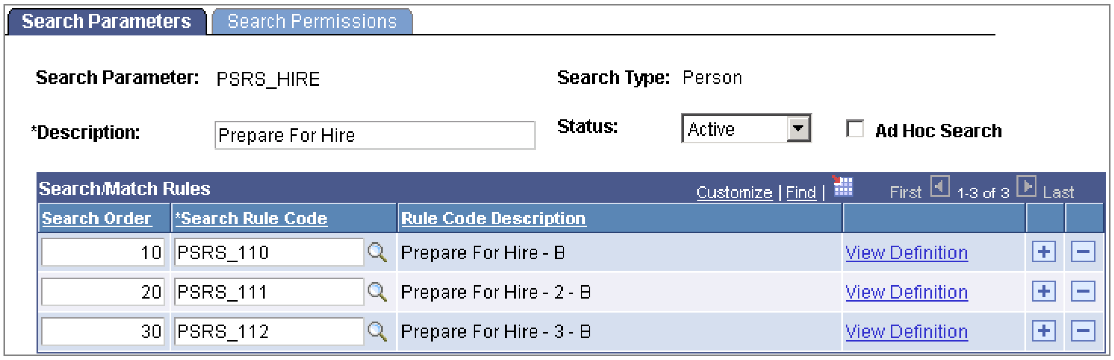
***Description:** Prepare For Hire - B **Ad Hoc Search**

Search Fields Customize | Find | First 1-10 of 10 Last

*Sequence	Search Field	Field Description	Required	Usage	Start Position	Number of Characters	Length
1	FirstNameSrchRule	First Name Search	☑	Contains	1	2	30
2	LastNameSrchRule	Last Name Search	☑	Contains	1	2	30
3	MiddleNameRule	Middle Name	☐	Contains	1	2	30
4	AltCharacterNameRule	Alternate Character Name	☐	Contains	1	2	50
5	NationalIDRule	National Id	☐	Contains	1	4	20
6	DateOfBirthRule	Date of Birth	☐	Equals			10
7	Address1Rule	Address Line 1	☐	Contains	1	4	55
8	CityRule	City	☐	Contains	1	2	30
9	StateRule	State	☐	Contains	1	2	6
10	CountryRule	Country	☐	Contains	1	2	3

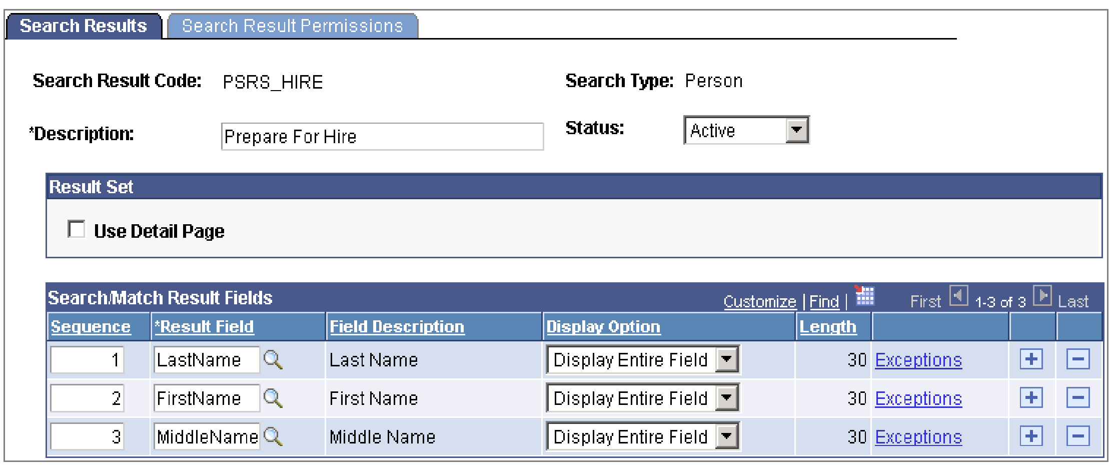
Search rules identify which fields should be searched

When a user runs the search, the system searches according to these rules and search orders until it either encounters a potential duplicate or executes all search sequences and finds no potential duplicate.



Search parameters are made up of search rules

Use search result codes to specify the data that you want Search/Match to return in the grids on the Search Results page for the potential matching IDs that it finds. You can define field-level security for fields that you consider sensitive. For example, you might allow some users to see the full birth date, but restrict other users to see only the year (or nothing at all), depending on the Primary Permission List in their user profile.



Define which fields should display the results of the search and match

PeopleSoft delivers search rules, search parameters, and search results with your system. You can use these as they are, modify them, or add as many as you need.

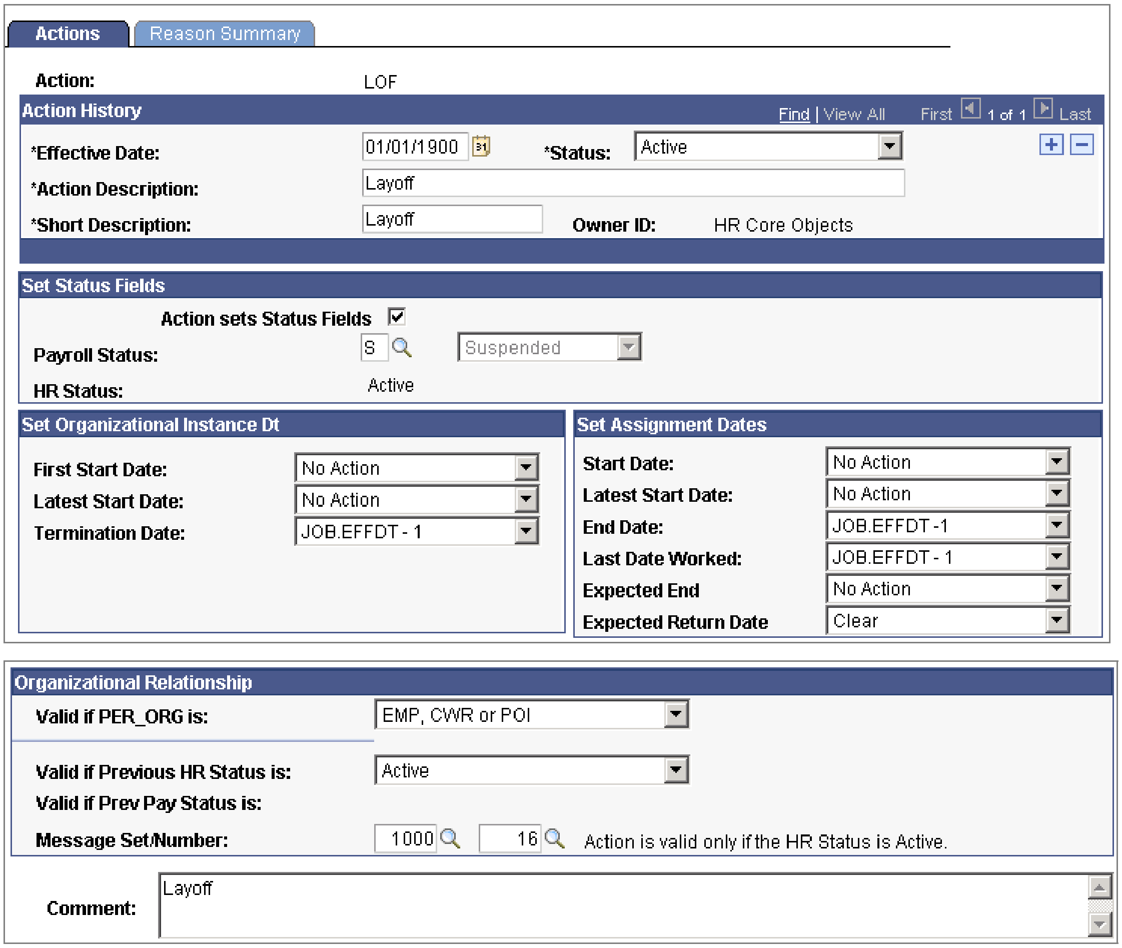
Automatic Search/Match

Automatic search reinforces the use of Search/Match when you create a new ID in a transaction page. To trigger an automatic search from the transaction page, associate the component that contains that page with an active search parameter. When the user enters all of the necessary data to create a new ID on that page and saves the transaction record, Search/Match begins automatically. The system uses the predefined search parameter and the data entered by the user as search criteria. If Search/Match does not find matching IDs, the system saves the transaction successfully. If Search/Match finds at least one matching ID, the system displays the search results inside a grid on the Search Results page.

Configurable Actions and Action Reasons

Not all job actions are appropriate for all types of workers. Not all companies, geographies, or industries share the same business rules. Organizations work differently according to their own needs and priorities and may want to configure their job actions to align more closely with their own business processes and employee data tracking requirements.

In recognition of these diverse data-management needs, HRMS 8.9 delivers configurable actions and action reasons. Actions have been moved from the translate table and relocated to their own table. New setup pages complement this new table.



Use the Actions component to create and maintain HRMS actions

The configurable actions and action reasons provide the following features for customers.

Status Definition

With PeopleSoft 8.9, we've added an additional status field to give you more accuracy to track and report on your workforce. The HR Status and Payroll Status fields enable you to distinguish between HR and payroll.

In the past, a person's payroll status was used to infer their HR status. This didn't always give the desired results. For example an employee on leave of absence has an active HR status but an inactive payroll status because he's not receiving a paycheck. A terminated employee who is receiving a pension payout has an inactive HR status but an active payroll status. Distinguishing between the two statuses gives you a more accurate picture of the people in your system.

When you create a new action, you can decide what impact the action has on a person's statuses, if it has one at all, by selecting the Action sets Status Fields check box. When selected, the system displays the Payroll Status and HR Status fields. Payroll status determines HR status and when you select a payroll status for the action, the system displays whether the HR status on the JOB record will be *Active* or *Inactive*.

Set Status Fields group box

The following table shows the available payroll statuses and the associated HR statuses:

Payroll Status	HR Status
(A) Active	Active
(D) Deceased	Inactive
(L) Leave of Absence	Active
(P) Leave with Pay	Active
(Q) Retired with Pay	Inactive
(R) Retired	Inactive
(S) Suspended	Active
(T) Terminated	Inactive
(U) Terminated with Pay	Inactive
(V) Terminated Pension Payout	Inactive
(W) Short Work Break	Active
(X) Retired-Pension Administration	Inactive

Customers can also set the prerequisite status for a job action. For example, a customer could create a rule that prohibits the use of the leave of absence action if the person's status is currently terminated.

Storing the HR Status on the JOB record makes it easy to choose an HR status of either *Active* or *Inactive* during reporting instead of having to know which payroll status to use.

Actions by Organizational Relationship

Companies can limit the use of actions to specific segments of their populations based on the people's relationship to the organization. Use of specific actions can be restricted to employees, contingent workers, persons of interest with job records, or all three organizational relationship designations.

New Flexible Row-Level Security

In HRMS 8.9, we've made significant enhancements to our row-level security in the following areas:

- Simple installation of security options such as Japanese additional assignment and international security.
- Even faster fast views.
- Configurable row-level security.
- Ability to assign security to users view via roles, instead of just the Row Security Permission List, enabling you to create a person's data access from a combination of permission lists.

As any decentralized or complex company knows, determining and controlling who has access to that data can be a challenging task. In light of the emerging legal requirements for data transparency and accountability, controlling who is accessing your data and for what purpose becomes even more critical.

PeopleSoft Enterprise HRMS 8.9 delivers an innovative and flexible way to define your organization's row-level security. You decide how granular you want your control to be by basing row-level security on practically any field that you choose.

PeopleSoft Enterprise HRMS 8.9 now includes row security for departments, to enable you to control sensitive data about the departments themselves, such as budgets or headcounts, people with jobs, including contingent workers and people of interest (POIs), POIs without jobs, and job openings.

We've delivered the most requested security types preconfigured, enabling you to control data access at the following levels:

Departments	People with Jobs	POIs Without Jobs	Job Openings
• Department (by department tree) • Department (by individual department) • Department SetID	• Department (by department tree) • Department (by individual department) • Location • Business Unit • Company • Salary Grade • Regulatory Region • Organizational Relationship (employee, contingent worker, or POI)	• POI Type • Business Unit and POI Type • Location and POI Type • Institution and POI Type	• Company • Business Unit • Department (by department tree) • Location

You can create additional security types with little or no customization.

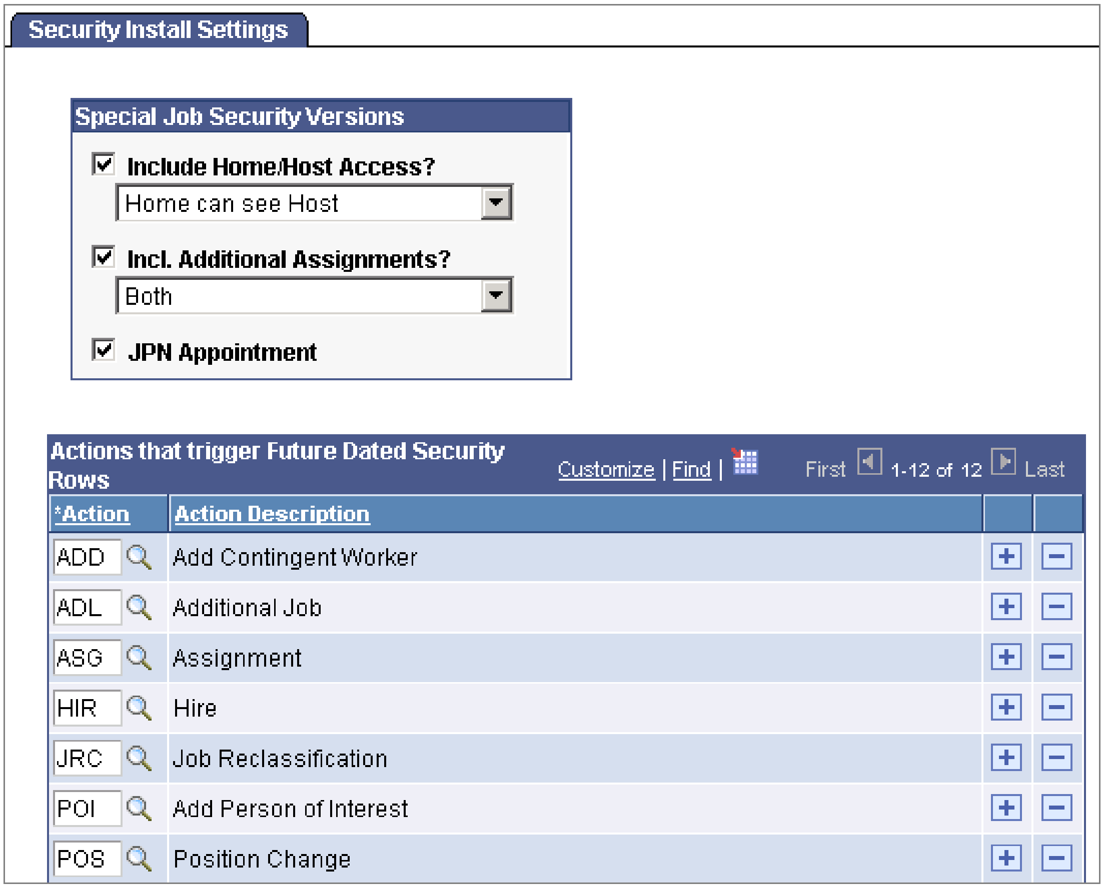
Simple Installation of Security Options

In 8.9 we've significantly simplified how you install the security settings. You can choose how to control security access to a person's additional assignment and global assignment records. For example, you could opt to allow those with access to the person's primary records access to the assignment records, ensuring that, no matter where a person has a temporary assignment, their records are still accessible by those who need them without having to make any changes to user's security permissions.

You can also now install Japanese additional assignment security by selecting a check box.

PeopleSoft Enterprise HRMS security now includes future dated transaction rows in row security. For example, Eric Simpson is currently working in the Western business unit, but in two months will transfer to the European business unit. As of today, the human resources administrator with security access to the Western business unit can access his current records and the human resources administrator for the European business unit can access Eric's future Job Data record, before it has become effective.

You can choose which actions will trigger a future dated security row to limit the future-dated rows to just those that are accompanied by a change in security data. This keeps your security information absolutely current, without slowing it down with unnecessary data rows.



You can easily install your security settings

Flexible Security Definition

Row-level security for HRMS 8.9 includes features that enable organizations to align their security strategy with their business model and their corporate culture.

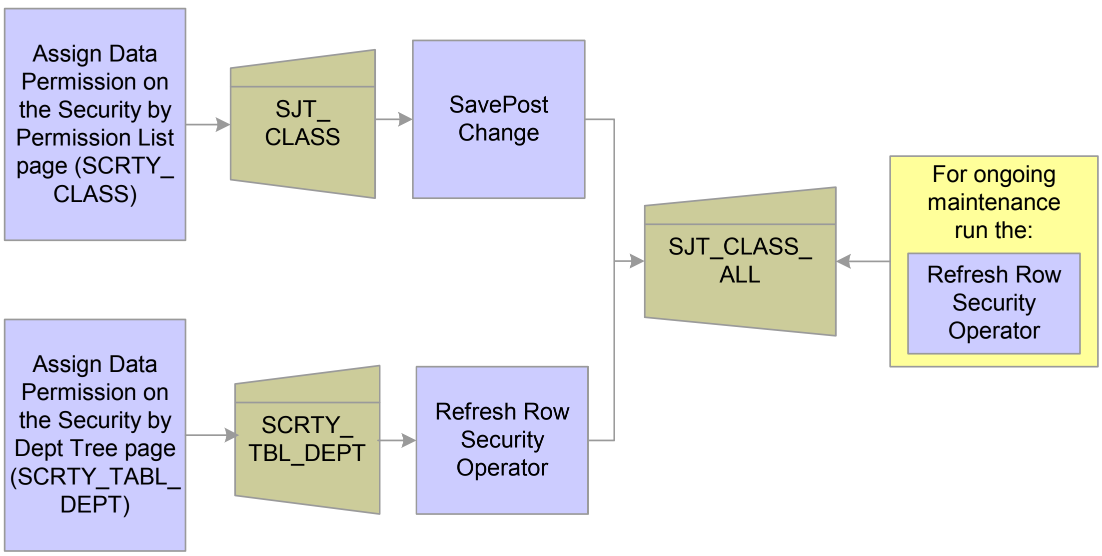
Some HR organizations may be centralized in one country; others may be spread across many countries. Some companies may allow anyone in HR to view data on anyone in the organization. Other companies may want to restrict data access by location or worker population so that very few people can access information about the executive staff in corporate headquarters. Perhaps a large corporation has one HR team that manages the union workforce while another HR team manages salaried employees.

You can configure security to support any of these business models, and many more. The existing department security process can be carried forward into HRMS 8.9 for organizations that do not want to change their security setup.

Once you have determined how you want to control data security, simply select the Enabled check box on the Security Type Table for the security types you need.

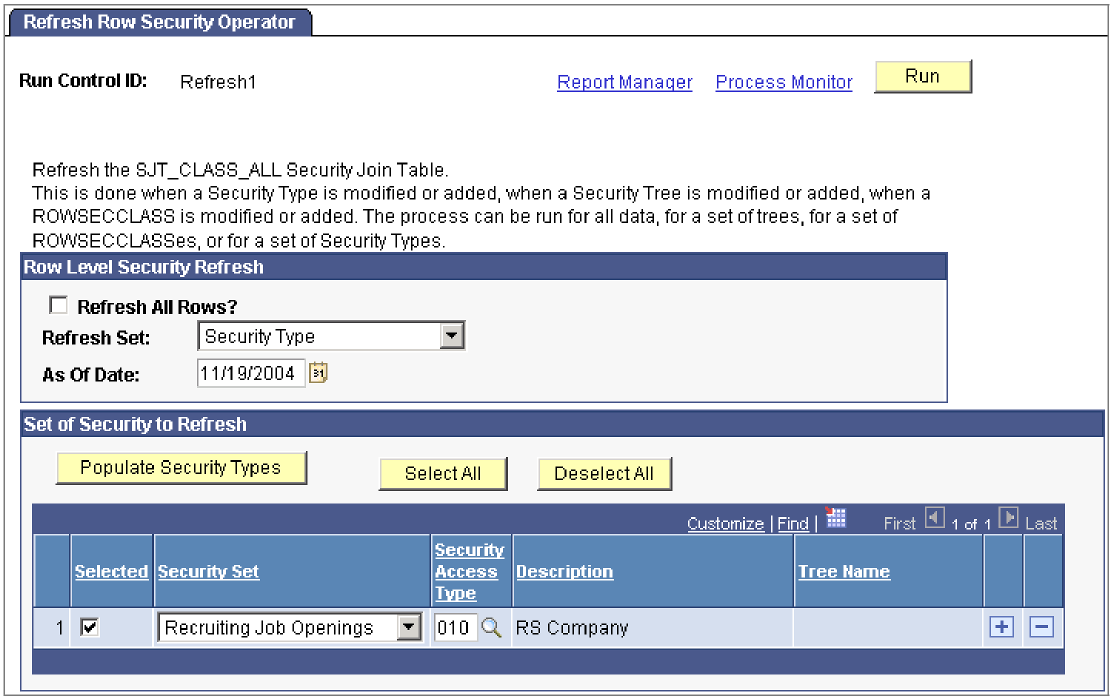
Even Faster Security Views

To support the new flexible security structure, we're enhancing the security tables. Security tables (called security join tables) are updated in real time. When you make a change to a permission list on the Security by Permission List page, PeopleCode automatically updates the operator security join table (SJT_CLASS_ALL).



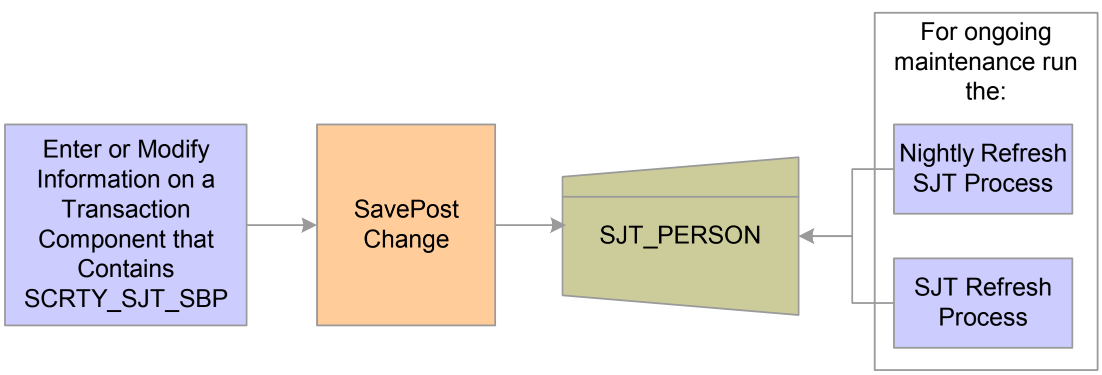
PeopleCode keeps most security data up to date automatically

There are also more flexible batch updating capabilities. The only time that a refresh process must be run is if there is a change to the security trees—but even that process is more flexible and performs partial updates. There is no longer a need to update the entire table.



Refresh all rows in the security join tables or just the ones that you know have changed.

The system also updates the transaction data security join tables automatically using PostSave PeopleCode so that a person's data is always secured by the right information. A nightly refresh process captures any future-dated rows or any other change that may not have triggered the PeopleCode. A second refresh process is available if to update targeted portions of the security join table as needed.



New or modified transaction data is automatically updated in the transaction security join tables.

Data Permission for Roles and Row Security Permission Lists

In previous releases, row security permission was attached only to row security permission lists, which were attached to the user on the User Profile – General page. This meant that all of a user's data permission requirements needed to be met by a single permission list. In 8.9 we've increased your options for assigning row security to a user.

Department tree-based security is still assigned to row security permission lists, but you can now:

- Assign additional, non-tree based security to a row security permission list, alone or in addition to tree-based security.
- Assign row security access to permission lists and assign the permission lists to roles.

You can now easily manage the most complex or simple data permission requirements.

For example, permission list JobsbyDept has access to people in department 10100, permission list JobsbyLoc has access to people in location UK1, and permission list MyJobs has access to people in location USA. Permission list JobsbyLoc is assigned to Role 1 and permission MyJobs is assigned to Role 2. The data access of permission list JobsbyDept is based on a department security tree. While the permission list can be assigned to a role, the tree-based security is not accessible by the role.

If we assign user A the row security permission JobsbyDept on the Row Security field on the User Profile – General page, and Role 1 and Role 2 on the Roles page, user A's has data permission for the following: department 10100, location UK1, and location UK2.

PeopleSoft Enterprise HCM Transformation Framework

When an application sending a message uses a message structure different than the application receiving it, the message must be transformed in order to be accepted by the target application. PeopleSoft Enterprise HRMS 8.9 introduces the HCM Transformation Framework to enable you to use definitional logic to transform messages. Using information you set up, the transformation framework applies the correct transformation logic to produce a message that complies with the target application requirements.

HCM Transformation Framework enables seamless integration among PeopleSoft applications as well as with third-party applications such as Oracle, SAP, and Siebel. Transformation schemas are associated with transformation maps, enabling you to quickly locate and modify a schema to respond to external changes.

The transformation map registry is made up of transformation maps. The transformation map defines the message properties of the message for both the target and source application. For each transformation map, create a transformation schema, an XML document that defines the message structure mapping between two applications.

When a message needs to be transformed in order to be successfully received by an application, you need to assign a transformation program with the message on the Integration Broker Relationships component (IB_RELATIONSHIP).

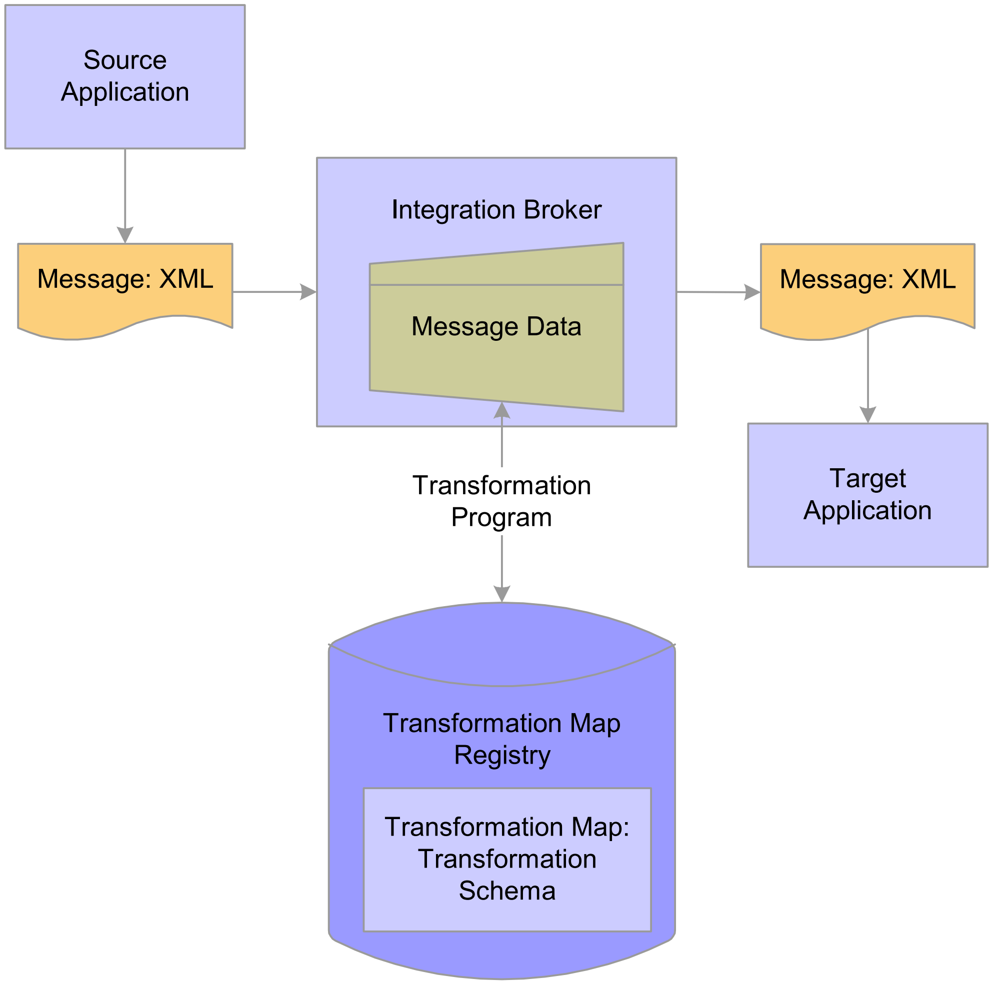
There are six transformation programs supported by the transformation framework:

- HTMF_TR_IA, for inbound asynchronous communications.
- HTMF_TR_IS, for inbound synchronous communications.
- HMTF_TR_ISR: for the inbound synchronous response.
- HTMF_TR_OA, for outbound asynchronous communications.
- HTMF_TR_OS, for outbound synchronous communications.
- HMTF_ TR_OSR for outbound synchronous responses

Based on the transaction type, choose the appropriate transformation program to associate with your application message.

When an application publishes a message that requires transforming, PeopleSoft Integration Broker invokes the transformation program associated with the message. The transformation program determines which transformation map corresponds to the target message and applies the transformation schema to the message data. The transformation schema can modify the metadata or the message data itself to comply with the target application requirements. PeopleSoft Integration Broker repackages the transformed message data into an XML document that is structurally compliant with the target application. The Integration Broker can then deliver the message to the receiving application.

This diagram illustrates the flow of information from one application to another using HCM Transformation Framework:



Transformation data using the transformation framework

PeopleSoft Enterprise HCM Metadata Repository and Query Builder

PeopleSoft Enterprise HRMS introduces the HCM Metadata repository and Query Builder. These two tools will provide a variety of benefits to all HCM applications:

- Increased productivity.
- Ease of development.
- Better reusability.
- Componentization of code.
- Ease of maintenance.
- Better user experience.

The Metadata repository enables you to define and manipulate PeopleSoft database records as objects and add levels of abstractions on top of Database records in mere minutes. The levels of abstraction separate the database record from the user, meaning that the user doesn't have to have an understanding of the data model to manipulate or query data using Query Builder.

Metadata objects can be named according to any functional requirement so their names can be meaningful. Less technically inclined users will be able to easily define queries through the Query Builder using these meaningful objects and technical developers will be able to manipulate database records as objects.

Metadata Repository

Metadata is data about the data in your system. It defines every object, object attribute, and relationship between objects. Metadata enables you to define and manipulate the records in your PeopleSoft Enterprise HRMS database as objects.

The HCM metadata object model consists of the following two elements:

- PeopleTools-level metadata.

  Provides information about fields, field labels, and database records and views.

- HCM-level metadata.

  Establishes relationships between objects at the object level, defines object's services, and alternative labels.

HCM metadata object definitions are registered in the metadata repository as classes and these classes are grouped in the following two catalogs according to general behavior, processing, and attribute needs:

- Base catalog.

  Define the general behavior and attributes for a class:

  - Group objects for better processing and querying.
  - Provide a single layer of inheritance for derived classes.

- Object catalog.

  - Can be the child object of a parent base class, inheriting all of the attributes of the base class.
  - Are defined with unique attributes in addition to any inherited attributes.

For example, the base class object, Person Base, is the parent to the derived object class, Person.

Query Builder

Query Builder is a flexible tool that is used to query class objects that are defined in the PeopleSoft HCM metadata repository.

Query Builder lets you:

- Create queries of unlimited length and complexity without the need to know the underlying database model.

  Query builder automatically generates the most efficient SQL based on the metadata class definitions, generates all SQL joins automatically based on the relationships defined in metadata, and includes SetID and effective-dated logic.

- Select any number of available output fields to display results from both the underlying class and the class relationships.
- Modify current queries to include different output and criteria.
- Run previously defined queries.
- Navigate to objects that are returned as query results.
- Group the output with counts, sums, and averages and include minimums and maximums for the grouped output.

  Query Builder automatically generates the appropriate SQL for aggregations.

- Preview the Structured Query Language (SQL) query generated by Query Builder.

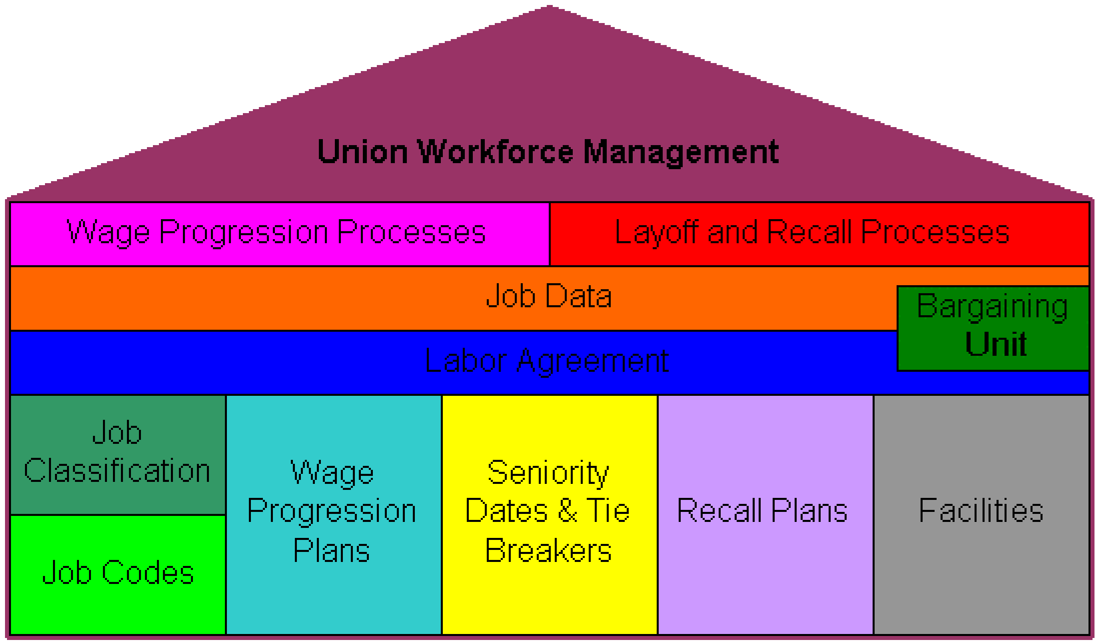
Whereas PeopleSoft Query uses records and fields in queries, Query Builder queries objects and attributes. This approach has two benefits:

- You are more likely to recognize an object name than record and field names, and hence find it easier to query objects that are in the system.
- Underlying record and field definitions of system objects can change without affecting existing query definitions, resulting in more robust queries.

Management by Labor Agreement

Performing critical business processes such as hires, terminations, and pay rate changes is a complex endeavor when HR professionals must adhere to multiple, detailed labor agreement specifications. PeopleSoft has confirmed that approximately 60 percent of PeopleSoft customers are in unionized industries. To better understand industry requirements, PeopleSoft conducted extensive focus groups and joint design sessions with customers and gathered industry specialist feedback. As a result of this analysis, HRMS 8.9 delivers new labor agreement management functionality that helps unionized customers by automating and streamlining many of their current manual processes.

The following figure describes the content and processes that are supported by labor agreements within HRMS 8.9:



Data relationships that support the union workforce process

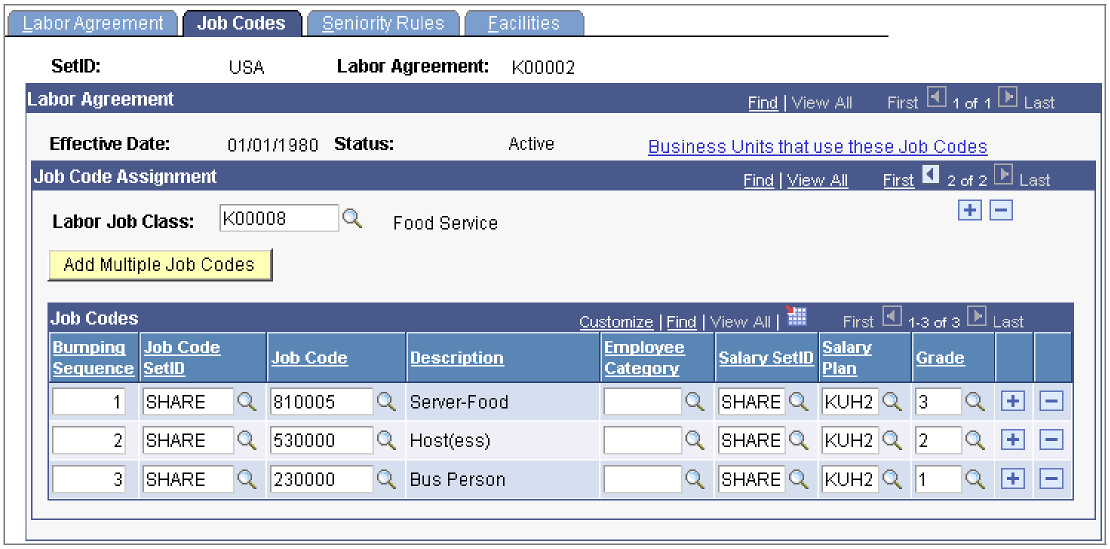
The labor agreement definition includes the following features.

Job Codes and Wage Progression Salary Plans

Within a collective labor environment, a person’s job code dictates many of the job attributes, job classification, bumping rights, and wage plan.

In HRMS 8.9, you can assign job codes to a labor agreement in a hierarchical order to ensure that workers covered under the labor agreement are assigned to one of the selected job codes.

You also have the option to associate a wage plan with each job code. When a worker’s labor agreement or job code is updated, the system enters the associated wage plan on the worker’s job data record.



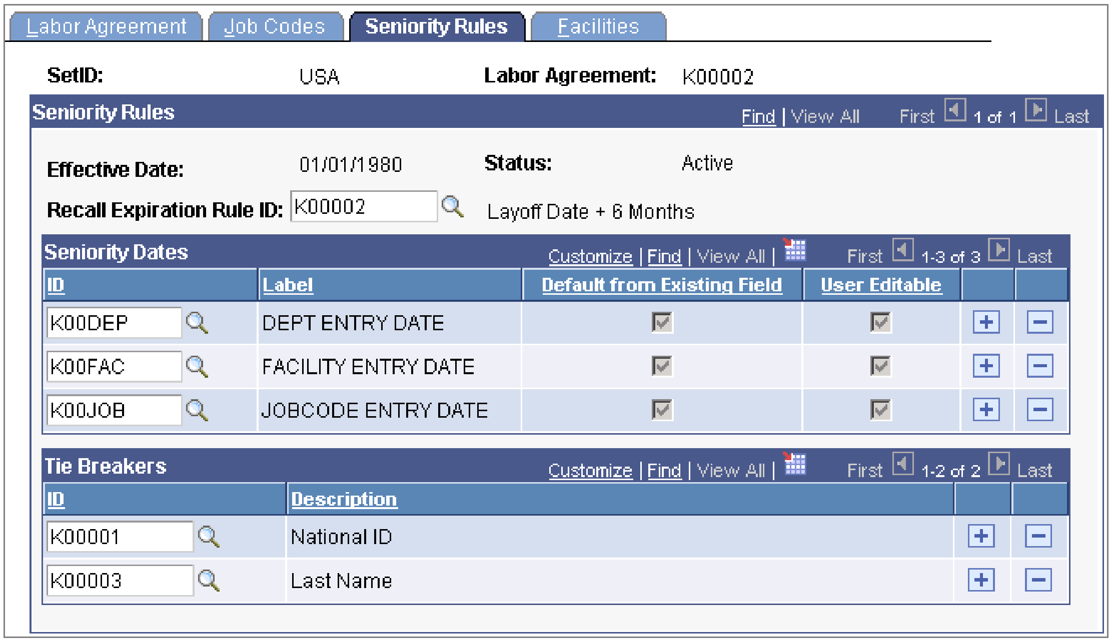
Associate job codes and wage plans with labor agreements.

Configurable Recall Rights Expiration Rules, Seniority Dates, Tie Breakers

Labor agreements usually specify how long a laid off worker can maintain priority for rehire in the event of a recall. Set up recall expiration rules based on time elapsed since the layoff, seniority, or create a rule specifying that there are no recall rights at all. In the event of a layoff, the system creates a recall rights record for the laid off workers and calculate the date that their recall rights expire using the expiration rule associated with their labor agreement.

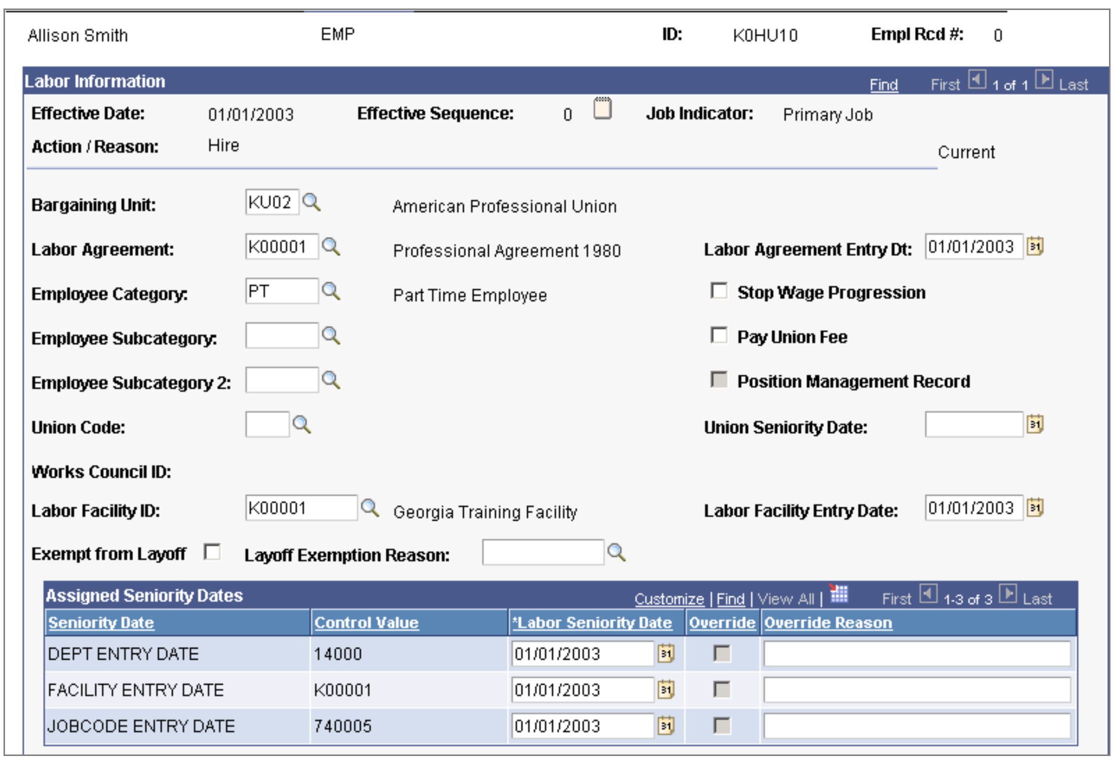
Seniority dates drive numerous processes within unionized companies, primarily in the United States but also in some EMEA countries. Seniority dates determine critical rights such as bidding for shifts, receiving wage increases, or determining a person’s place on a layoff roster. Furthermore, seniority dates can be determined by different criteria. For example, the date used to determine a worker’s seniority for shift bidding could be the date that he started working at a new facility, but his vacation accrual may be determined based on his seniority within the company or union. Expiration of recall rights can also be determined by seniority.

In HRMS 8.9, customers can define up to 12 seniority dates per labor agreement. These dates can be based upon dates that already exist in the system, ensuring that the system populates the fields with an existing date. Customers can label these labor-related seniority dates in a way that makes sense to them and their labor agreements. For example, customers may want to create a Competitive Seniority Date to meet the needs of their labor agreement. Customers can base the Competitive Seniority on the Job Data’s existing Job Code Entry Date field and set it up so to default from the Job Code Entry Date field. Customers may also create dates that they can populate manually or make it possible to override defaulted dates. Seniority dates are assigned to labor agreements.



Associate recall expiration rules, seniority dates, and tie breakers with a labor agreement.

At the job data level, when you assign a worker to a labor agreement on the Job Labor page, the system adds the associated seniority dates to the page and populates those dates that are based upon existing values.



The seniority dates from a worker’s labor agreement display on the Job Labor page.

Frequently, more than one worker has the same seniority rank, and a tie breaker is applied to determine a final order. Create tie breakers based on a number of fields and assign them to the labor agreement. When you need to determine seniority, you can use a configurable report to select the appropriate population base with the desired seniority date and tie breaker. The system will sort the workers accordingly. Layoff and Recall rosters also use tie breakers to determine the seniority of workers holding the same seniority rank.

The system uses the tie breakers associated with the labor agreement to determine a worker's place on the layoff roster when workers have the same seniority.

Facilities

For unionized companies, a facility is defined as the physical workspace covered by a labor agreement. It could be a store, plant, campus, or medical center. There could be more than one location within a facility, or there could be more than one facility within a location. For these reasons, unionized organizations need a flexible way of designating facilities.

In HRMS 8.9, a new table allows customers to define facilities required for labor agreement administration. The facilities are then associated to the labor agreements. The new facility field is maintained for each worker on the job record. This field enables you to better manage your staff in the event of a layoff or recall or for reporting purposes.

Wage Progression Salary Plans

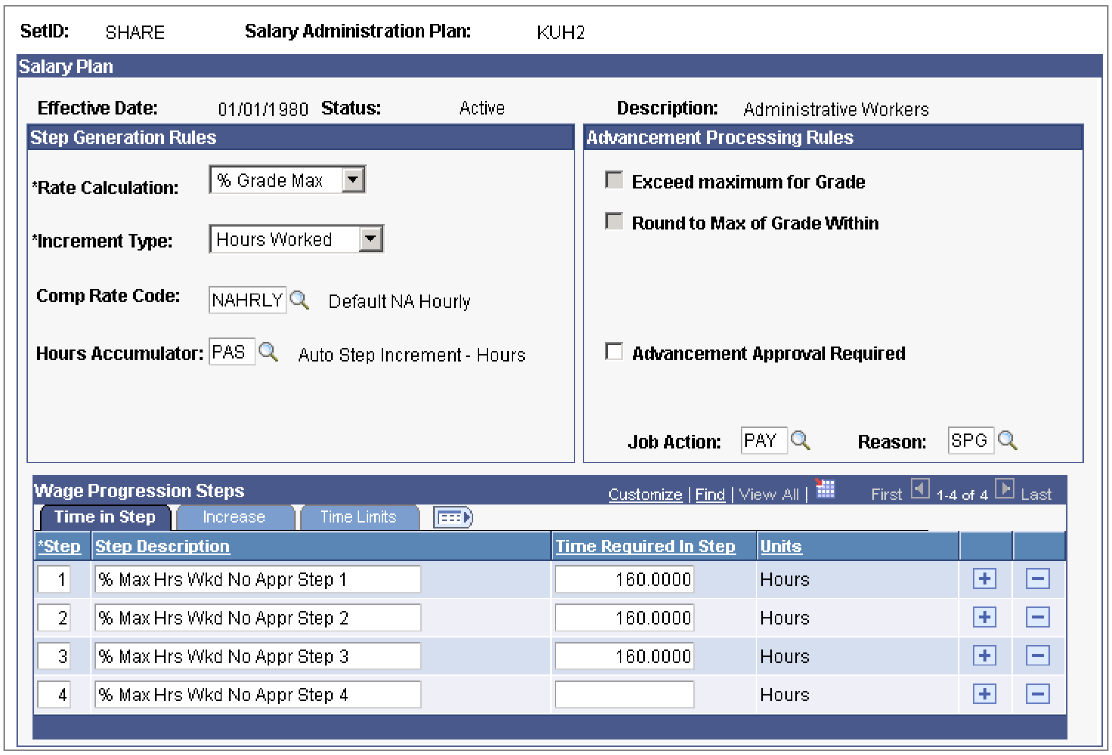
Wage progression is a core process for unionized companies, particularly in the United States. Monitoring eligibility and maintaining correct compensation is challenging. The challenge grows with the size and complexity of a company's unionized workforce.

Wage progression is the step-by-step advancement of a worker's compensation rate from a beginning rate to one of full parity. The progression is based on a wage progression rule associated with the worker's salary plan. The rule includes step progression requirements and a rate calculation formula.

HRMS 8.9 automates new hire or new-in-job wage progression with processes that evaluate the rules against eligibility criteria and inserts new compensation rates. Common progression eligibility criteria that can be supported with HRMS 8.9 include time worked and calendar-based elapsed time.

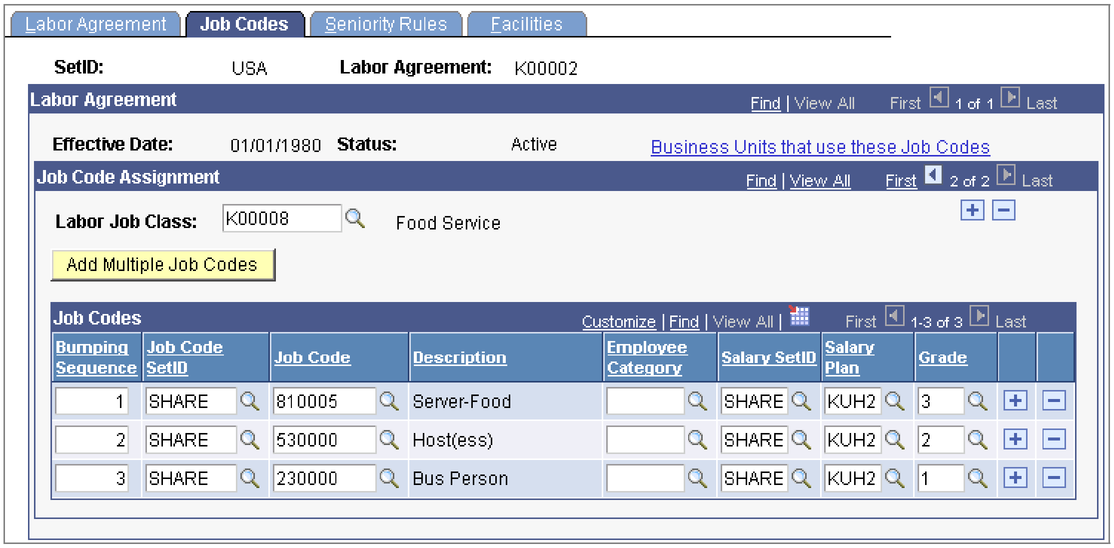
When you create or modify a salary plan, indicate if it's a wage progression plan. If you select the Wage Progression Plan check box, the system displays a link to the Define Wage Progression Rule page, where you define the rules surrounding wage progression for this plan.

These wage and salary plans with progression are then associated to wage grades and are used to generate progression steps with the appropriate pay rates. Step increases within grades can be based on formulas such as percentage of maximum rate, flat amount, percentage of current rate, or custom configured.



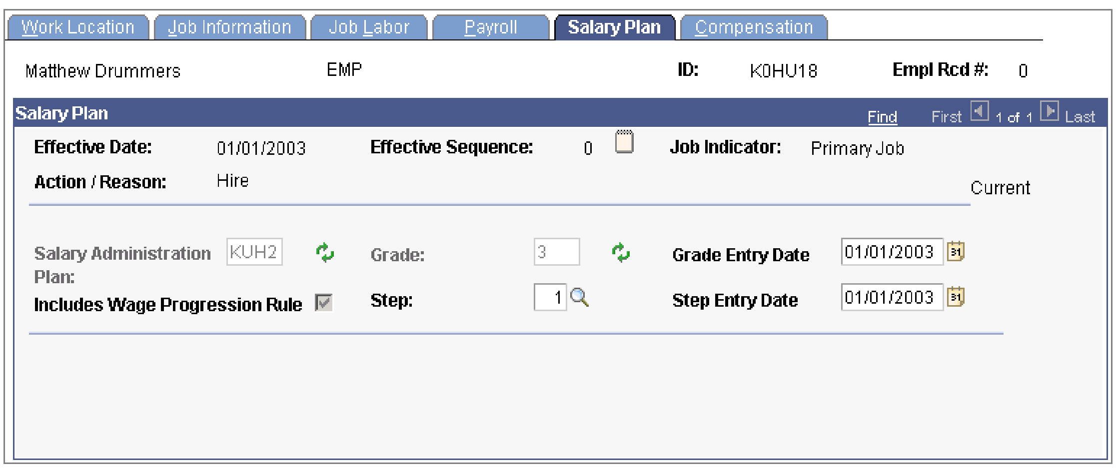
Define wage progression rules for a salary plan

Associate wage progression rules with job codes at the labor agreement level.



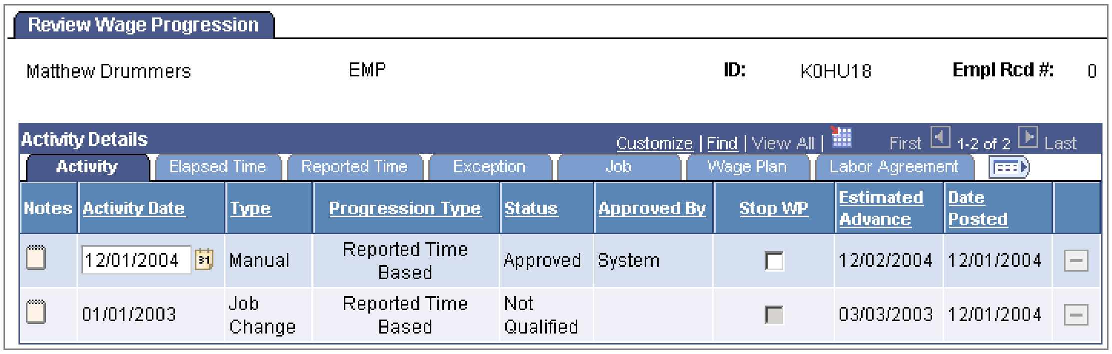
Associate a job code with a wage progression plan

When you select a labor agreement with has associated job codes and wage progression plans on a worker's Job Labor page, the system ensures that you select one of the job codes included in the labor agreement and then enters the job code's salary plan and grade information on the Salary Plan page.



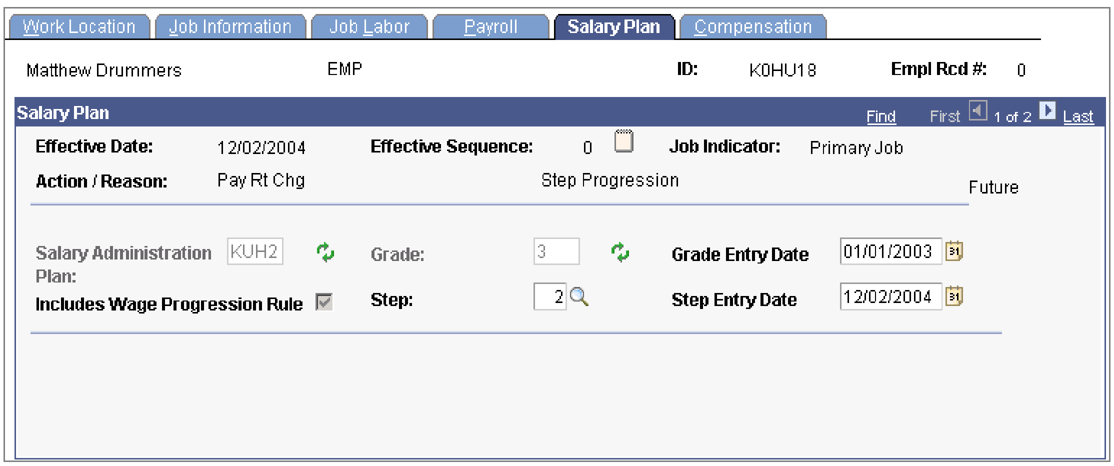
The system enters the salary plan and makes the plan and grade fields unavailable for entry.

To manage wage progression, the Update Wage Progression processes gather the data required to make a decision about the worker's eligibility to advance and stores that information in the Review Wage Progression component, where you can review it and make any necessary modifications. Once the all of the necessary data is accumulated, the system can flag qualified workers for advancement.



Review a worker's wage progression and make manual adjustments, if necessary.

When you are satisfied that the information is accurate, you can process the wage progression. The system inserts a new Job Data row for the qualified workers with their new step and related wage rate and the new compensation rate is processed in the next payroll.



When you process wage progression, the system automatically inserts a new row into the Job Data pages with the new salary plan information.

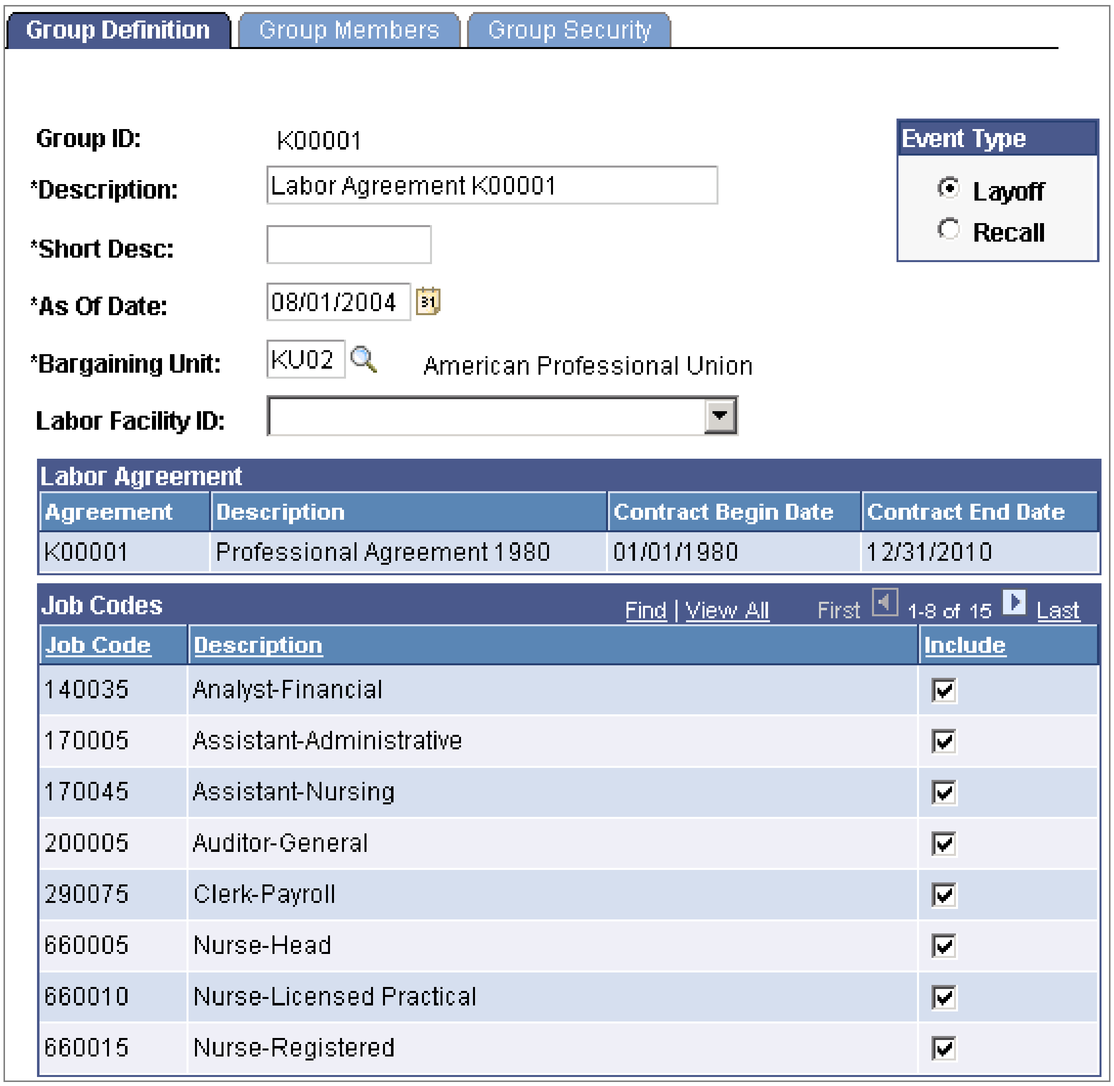
If, during the calculation of a worker's new rate, they reach or exceed the maximum rate for the salary grade, the system considers them at parity for their job wage rate. In these circumstances, the system increments the worker to the next highest step for the grade and no longer includes them in the wage progression processes.

Because wage progression is primarily a business practice for unionized, United States organizations, this feature is delivered with integration for receiving time worked from Payroll for North America. Time staging tables are also able to receive time data from other customized feeds. Because pay increases are triggered by the insertion of Human Resources Job Data records, any integrated payroll solution, such as Global Payroll or a third-party system, can be used for payment.

Layoff and Reinstatement Management

Companies that have large union workforces occasionally need to temporarily or permanently lay off large numbers of workers. A production plant may permanently close when a product is discontinued, or a workforce may be downsized for a temporary reduction in production demand. When these union workforce actions occur, seniority lists must be assembled, individual seniority rights must be considered, and a large number of transactions must be processed. Furthermore, accurate records must be kept to justify decisions to union authorities. In the case of temporary reductions, the process must then be reverse-engineered to return people to work. This is a time-consuming project that frequently occurs with little advance notice.

HRMS 8.9 provides companies with tools that manage the layoff and recall process. Create a group for the targeted population. Your definition can be broad, including everyone covered by the labor agreement, or you can narrow the group by facility, or job code.


Group Definition | Group Members | Group Security

Group ID: K00001
*Description: Labor Agreement K00001
*Short Desc:
*As Of Date: 08/01/2004
*Bargaining Unit: KU02 American Professional Union
Labor Facility ID:

Event Type
Layoff
Recall

Labor Agreement

Agreement	Description	Contract Begin Date	Contract End Date
K00001	Professional Agreement 1980	01/01/1980	12/31/2010

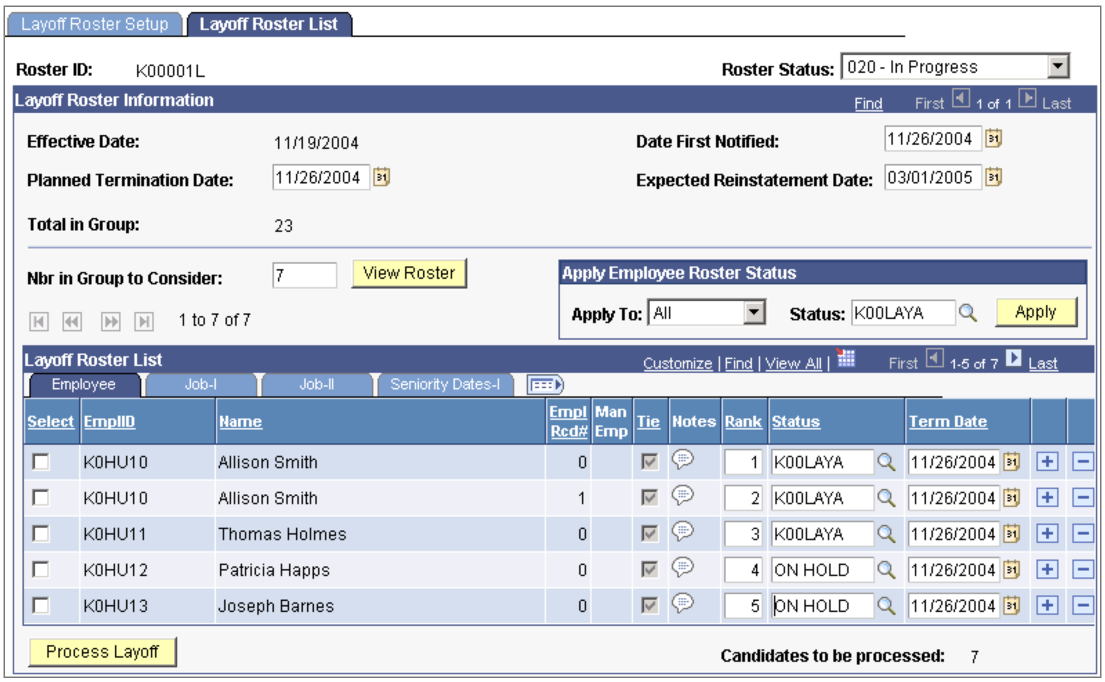
Job Codes — Find \| View All — First 1-8 of 15 Last

Job Code	Description	Include
140035	Analyst-Financial	☑
170005	Assistant-Administrative	☑
170045	Assistant-Nursing	☑
200005	Auditor-General	☑
290075	Clerk-Payroll	☑
660005	Nurse-Head	☑
660010	Nurse-Licensed Practical	☑
660015	Nurse-Registered	☑

Define the population that is affected by the layoff or recall.

A new roster management tool is then used to refine the list and to track the status of targeted workers. Layoff and recall rosters are based on the groups you defined. Select the valid seniority dates and tie breakers to help you manage the roster. Indicate how large you want the roster to be and generate the roster. The system includes those people who are not exempt from layoff and who have the lowest seniority (in the case of a layoff) or highest seniority (in the case of a recall) as determined by the seniority dates and tie breakers you selected.

For example, if the population you defined in the group has twenty-three people but you only need to layoff seven enter 7 in the Nbr in Group to Consider field and view the roster. The system determines who, in the larger group of 23, can be laid off, rank them in order of seniority and include the lowest 7 in the roster.



Generate a roster of the affected workers and manage the layoff process.

The list can be refreshed to account for changes to worker data and you can manually add candidates to the list. It can also be exported at any time to preserve list history. Transactions can be processed all at once or on different dates to support layoffs that are processed in waves.

The reinstatement and recall processes return workers to the job or position that they previously held while the recall process also enables you to use Mass Update to make further job data changes.

PeopleSoft Enterprise eProfile Manager Desktop Enhancements

eProfile Manager Desktop has reduced HR administrative costs and increased data accuracy by equipping managers with the tools to manage their own workers. Conducting and capturing workflow online increases visibility and accountability for approvals.

In HRMS 8.9, we've enhanced the Direct Reports interface, hierarchy navigation and text configuration.

Direct Reports Interface

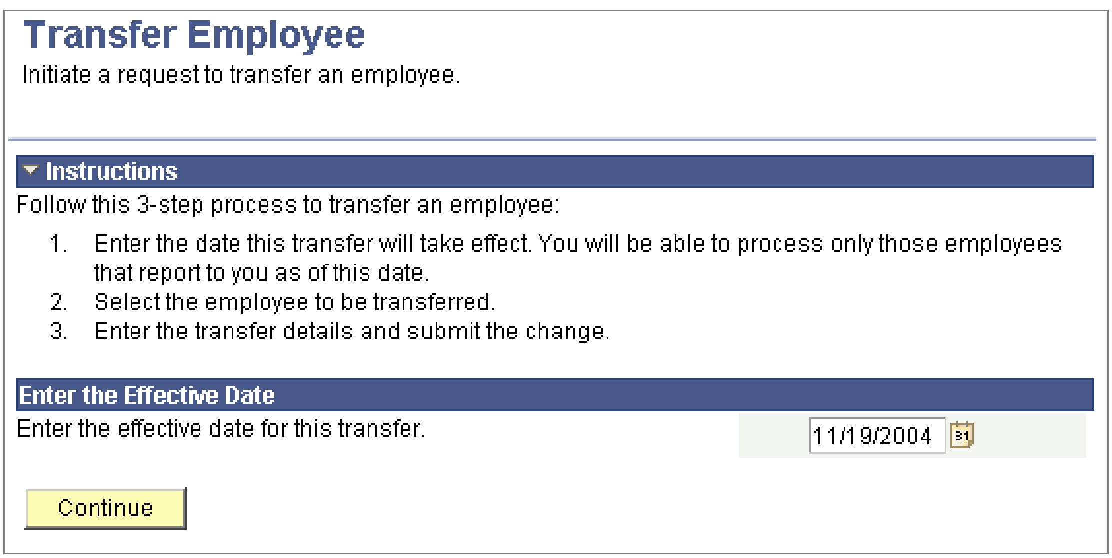
A new Direct Reports interface has been created in 8.9, creating a streamlined, consistent, re-usable UI for use in the Manager Desktop applications, while delivering new functionality not previously available.

The following eProfile Manager Desktop transactions have been modified to use the new Direct Reports interface:

- View Personal Info
- Reporting Change
- Transfer Employee
- Promote Employee
- Location Change
- Retire Employee
- Terminate Employee
- Full/Part Time Status

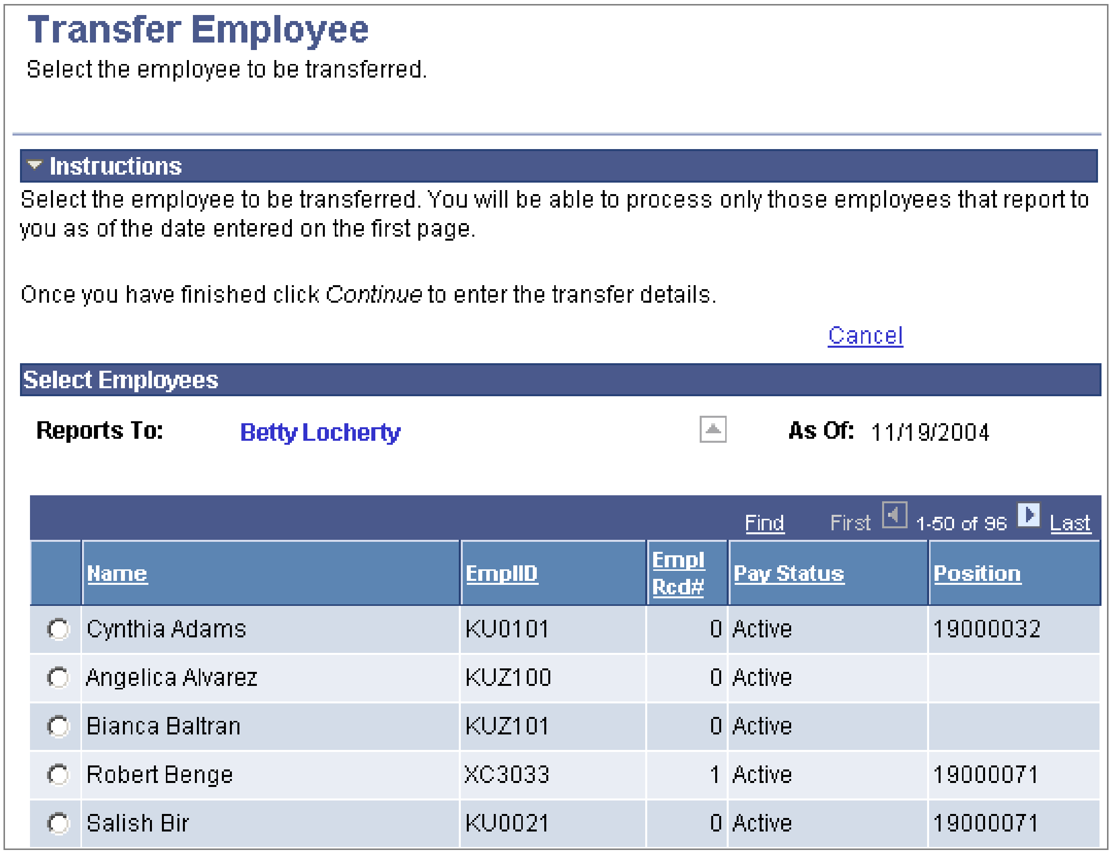
The new Direct Reports interface enables users to process transactions in a few simple steps.

First, enter the effective date for the transaction.



Transfer Employee – Initiate a request to transfer an employee.

Second, select the employee for the current transaction.


Transfer Employee

Select the employee to be transferred.

Instructions

Select the employee to be transferred. You will be able to process only those employees that report to you as of the date entered on the first page.

Once you have finished click *Continue* to enter the transfer details.

Cancel

Select Employees

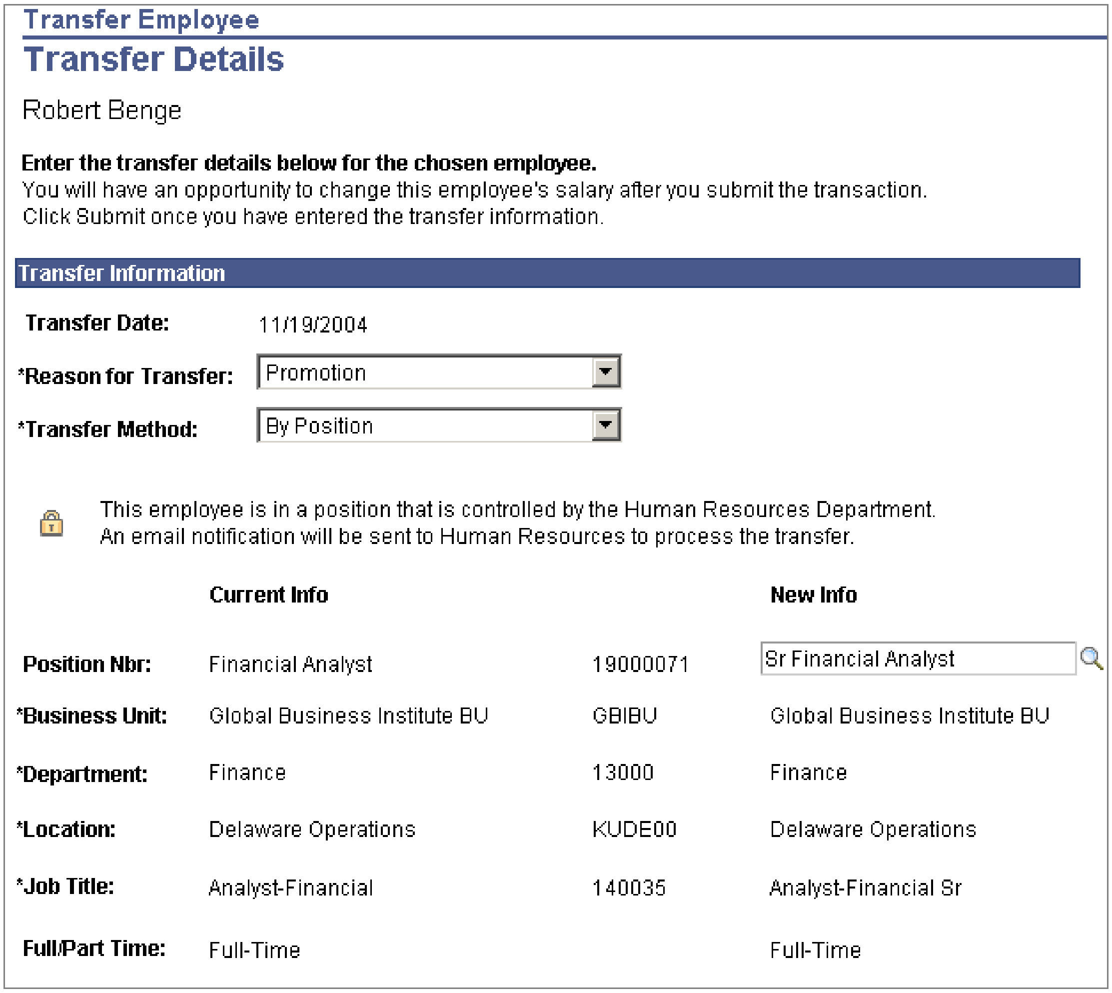
Reports To: Betty Locherty **As Of:** 11/19/2004

Find First 1-50 of 96 Last

	Name	EmplID	Empl Rcd#	Pay Status	Position
○	Cynthia Adams	KU0101	0	Active	19000032
○	Angelica Alvarez	KUZ100	0	Active	
○	Bianca Baltran	KUZ101	0	Active	
○	Robert Benge	XC3033	1	Active	19000071
○	Salish Bir	KU0021	0	Active	19000071

Transfer Employee – Select the employee to be transferred

Finally, enter the transaction details and submit the changes.



Transfer Employee – Transfer Details

Enhanced Hierarchy Navigation

With HRMS 8.9, senior-level managers can drill down through their entire organization and view or perform transactions on employees or contingent workers anywhere within their reporting chain in a few simple steps.

The new architecture also allows higher-level managers to access and transact on the direct reports of terminated managers or open positions. Managers can see open positions represented alongside their employee rosters. Managers who hold multiple jobs can access direct reports for each job quickly and easily.

Configurable Text

In HRMS 8.9, customers can represent their own policies, instructions, and business rules within the pages of eProfile Manager Desktop. They can update text within the pages through the message catalog.

France Enhancements

Human Resources 8.9 includes features that enhance the HR administrator's ability to easily comply with legislative requirements in France. Specifically, the 2483 training report and employee survey have been improved.

2483 Training Report

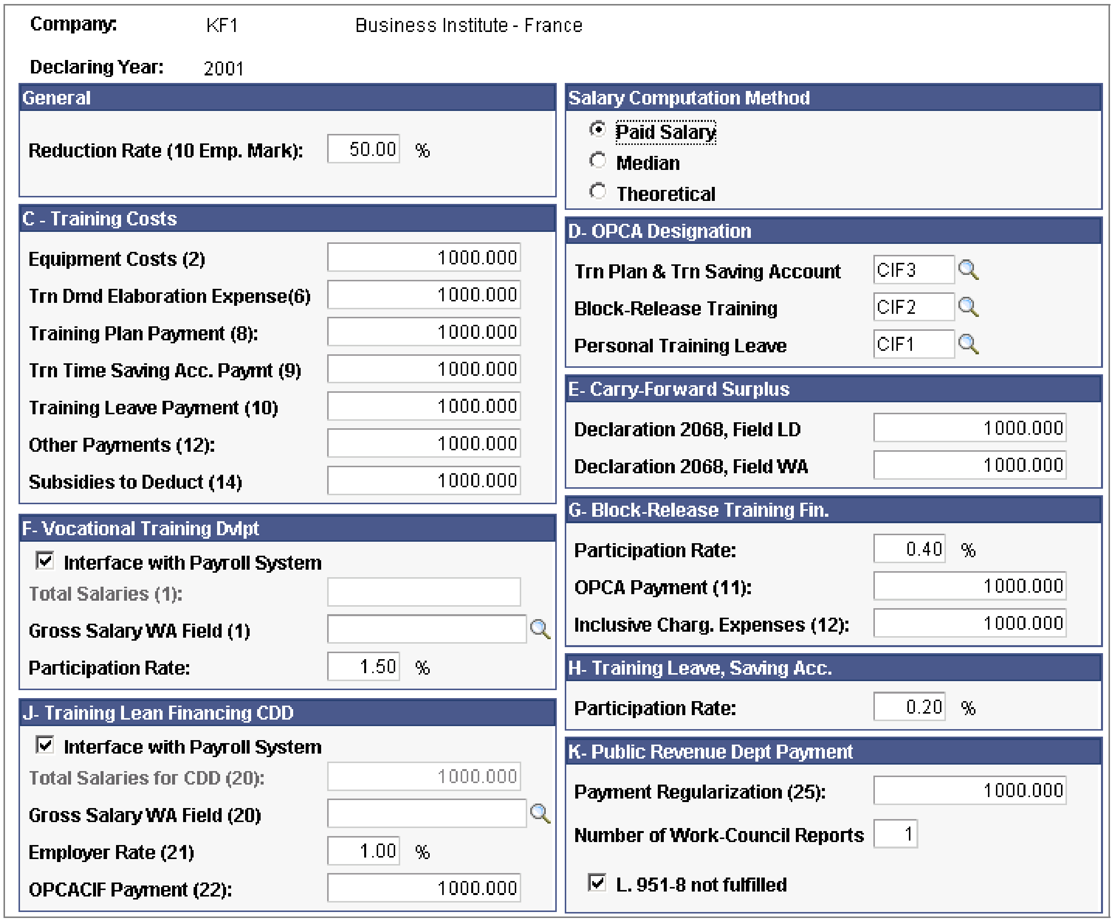
The 2483 training report is a mandatory yearly report used by French companies to declare costs related to training. Organizations must provide this report before April 30th to the tax office. In Human Resources 8.9, there are significant enhancements in the Administer Training module to improve French-specific information. The redesigned 2483 process now computes and fills all 2483 indicators. Many training departments spend a significant amount of time tracking and reporting the costs and producing the 2483 report.

Also for this release, an enhanced integration with PeopleSoft Enterprise Global Payroll for France ensures a more accurate student salary computation.

As part of HRMS 8.9, an expanded setup page and a new company costs page have enhanced the training module and the processing of the 2483 training report.

Trn 2483 Parameters Setup Page

The Trn 2483 Parameters Setup page has been greatly expanded to allow you to complete information for the 2483 process. With this information, the 2483 process is able to compute all indicators for the final report.


Company: KF1 Business Institute - France

Declaring Year: 2001

General

Reduction Rate (10 Emp. Mark): 50.00 %

Salary Computation Method

(•) Paid Salary
( ) Median
( ) Theoretical

C - Training Costs

Equipment Costs (2)	1000.000
Trn Dmd Elaboration Expense(6)	1000.000
Training Plan Payment (8):	1000.000
Trn Time Saving Acc. Paymt (9)	1000.000
Training Leave Payment (10)	1000.000
Other Payments (12):	1000.000
Subsidies to Deduct (14)	1000.000

D- OPCA Designation

Trn Plan & Trn Saving Account	CIF3
Block-Release Training	CIF2
Personal Training Leave	CIF1

E- Carry-Forward Surplus

Declaration 2068, Field LD	1000.000
Declaration 2068, Field WA	1000.000

F- Vocational Training Dvlpt

[x] Interface with Payroll System

Total Salaries (1):	
Gross Salary WA Field (1)	
Participation Rate:	1.50 %

G- Block-Release Training Fin.

Participation Rate:	0.40 %
OPCA Payment (11):	1000.000
Inclusive Charg. Expenses (12):	1000.000

H- Training Leave, Saving Acc.

Participation Rate: 0.20 %

J- Training Lean Financing CDD

[x] Interface with Payroll System

Total Salaries for CDD (20):	1000.000
Gross Salary WA Field (20)	
Employer Rate (21)	1.00 %
OPCACIF Payment (22):	1000.000

K- Public Revenue Dept Payment

Payment Regularization (25):	1000.000
Number of Work-Council Reports	1

[x] L. 951-8 not fulfilled

Trn 2483 Parameters Setup page

The following table describes the Trn 2483 Parameters Setup page:

Group Indicator	Applies to
B - General	Employee's general information.
Salary Computation Method	Calculating salary costs directly from the 'Trainees Salary Costs' page for the declared year.
C - Training costs	Training costs.
D – OPCA Designation	The name and address of OPCA organizations that received payments from a training company.
E – Carry-Forward Surplus	Computing the carry-forward surplus relying on the previous year's 2483 training report results, and on 2068 declarations indicators.
F – Vocational Training Dept.	The participation for Training development.
G – Block Release Training Fin.	Block-release training.
H – Training Leave, Saving Acc.	Training financing.
J – Training Lean Financing CDD	Training financing (for limited contract employees).

Group Indicator	Applies to
K- Public Revenue Dept Payment	Treasury department payment.
L – Training Statistics	Training statistics.
M – Student Number	The number of students.

HRMS 8.9 computes indicators according to the indicator list on the official 2483 report, version 6 (Cerfa n° 11168*6).

2483 Indicator List

Here is the comparison between the 2483 indicators provided with release 8.8 and the 2483 indicators provided with release 8.9:

Group	Indicator	Description	8.8 scope	8.9 scope
B	1	General Information	Calculated	Enhanced to have customizable contract list
B	2	Number of male employees	Calculated	Enhanced to have customizable contract list
B	3	Number of female employees	Calculated	Enhanced to have customizable contract list
B	4	Male + Female	Calculated	Enhanced to have customizable contract list
B	8	Apprentice Contracts	Calculated	Enhanced to have customizable contract list
B	9	Back to work Contracts	Calculated	Enhanced to have customizable contract list
B	10	Number of Adap. Qual. Contracts	Calculated	Enhanced to have customizable contract list
B	11	Number of Establishments	Calculated	Enhanced to have customizable contract list
C	1	Internal Training Cost	Calculated	Computation Process Improved
C	2	Equipment Cost	Not Specified	Entered into the 2483 setup page
C	3	External Training Cost	Calculated	Computation Process Improved
C	3A	Annual Agreement Cost	Not Specified	Computation Process Improved
C	3B	Multi-Annual Agreement Cost	Not Specified	Computation Process Improved
C	4	Trainees Salary Cost	Calculated	Computation Process Improved
C	5	Lodging & Transportation Cost	Calculated	Computation Process Improved
C	6	Training Requirement Estimation	Not Specified	Entered into the 2483 setup page
C	7	EDDF Cost	Not Specified	Computation Process Improved

Group	Indicator	Description	8.8 scope	8.9 scope
C	8	OPCA - Training Plan Payment	Entered into the 2483 setup page	Entered into the 2483 setup page
C	9	OPCA - Trn Saving Acc. Payment	Entered into the 2483 setup page	Entered into the 2483 setup page
C	10	OPCA - Training Leave Payment	Entered into the 2483 setup page	Entered into the 2483 setup page
C	11	Part-Time Course Financing	Calculated	No change
C	12	Other Financing, Cost	Entered into the 2483 setup page	Entered into the 2483 setup page
C	13	Total	Calculated	Computation Process Improved
C	14	Subsidy	Not Specified	Entered into the 2483 setup page
C	15	Chargeable Cost	Calculated	Computation Process Improved
D	1	Trn Plan & Trn Saving Account	Not Specified	Entered into the 2483 setup page
D	2	Part-Time Training	Not Specified	Entered into the 2483 setup page
D	3	Training Leave	Not Specified	Entered into the 2483 setup page
E	1	Expense Surplus	Not Specified	Entered into the 2483 setup page + computed
E	2	Declaration 2068 - Ligne WA	Not Specified	Entered into the 2483 setup page + computed
E	3	Training Tax Credit	Not Specified	Entered into the 2483 setup page + computed
F	1	Total Annual salaries	Entered into the 2483 setup page	Entered into the 2483 setup page or computed with integration
F	2	Employer Participation	Calculated	No change
F	3	Participation with Reduction	Calculated	Computation Process Improved
F	4	Total Training Cost	Calculated	No change
F	5	Expense Surplus	Calculated	No change
F	6	Expense Insufficiency	Calculated	No change
F	7	Training Tax Credit	Calculated	Computation Process Improved
F	8	Indicator 6 - Indicator 7	Calculated	No change
G	9	Employer Obligation	Calculated	No change
G	10	Obligation with Reduction	Calculated	Computation Process Improved

Group	Indicator	Description	8.8 scope	8.9 scope
G	11	OPCA Payments	Entered into the 2483 setup page	Entered into the 2483 setup page
G	12	Employer Fixed Expense	Entered into the 2483 setup page	Entered into the 2483 setup page
G	13	Indicator 10 - (11 + 12)	Calculated	No change
G	14	Total 11 to 13	Calculated	Computation Process Improved
H	15	Employer Obligation	Calculated	No change
H	16	Obligation with Reduction	Calculated	Computation Process Improved
H	17	OPCA Payments - Part Time	Entered into the 2483 setup page	Computation Process Improved
H	18	OPCA Payments - Train. Leave	Entered into the 2483 setup page	Computation Process Improved
H	19	Indicator 16 - (17+18)	Calculated	No change
J	20	CDD Total Annual Salaries	Entered into the 2483 setup page	Entered into the 2483 setup page or computed with integration
J	21	Employer Obligation	Calculated	Computation Process Improved
J	22	OCPA CIF Payments	Entered into the 2483 setup page	Entered into the 2483 setup page
J	23	Indicator 21 - 22	Calculated	No change
K	24	Training Cost Insufficiency	Calculated	No change
K	25	Regularization Payment	Entered into the 2483 setup page	Entered into the 2483 setup page
K	26	Payment/Company Work Council	Entered into the 2483 setup page	Entered into the 2483 setup page
K	27	CIF Insufficiency	Calculated	No change
K	28	CIF/CDD Insufficiency	Calculated	Computation Process Improved
K	29	Part-Time Insufficiency	Calculated	No change
K	30	Total Contribution	Calculated	Computation Process Improved
K	31	Contributions to the Government in Euros	Calculated	Removed
L	2	Male students paid by company	Calculated	Computation Process Improved

Group	Indicator	Description	8.8 scope	8.9 scope
L	3	Female students paid by company	Calculated	Computation Process Improved
L	4	Total students paid by company	Calculated	Computation Process Improved
L	5	Students paid by training fund	Calculated	Computation Process Improved
L	6	Total hours paid by company	Calculated	Computation Process Improved
L	7	Total hours paid by trng fund	Calculated	Computation Process Improved
L	8	Number of competency check	Calculated	Computation Process Improved
L	9	Number of Exp. Validation	This indicator did not exist	New Computation Process
L	10	Students exclusively paid by cmp	Calculated	Computation Process Improved
L	11	Students paid by financing body	Calculated	Computation Process Improved
L	12	Number of Competency Check	Calculated	Computation Process Improved
L	13	Number of Exp. Validation	This indicator did not exist	New Computation Process
L	14	Total paid hours	Calculated	Computation Process Improved
L	15	Nbr of qualification contracts	Calculated	Computation Process Improved
L	16	Total hrs for qualif contracts	Calculated	Computation Process Improved
M	1	Male Students	Calculated	Enhanced to have customizable contract list
M	2	Female Students	Calculated	Enhanced to have customizable contract list

Training Writable Array

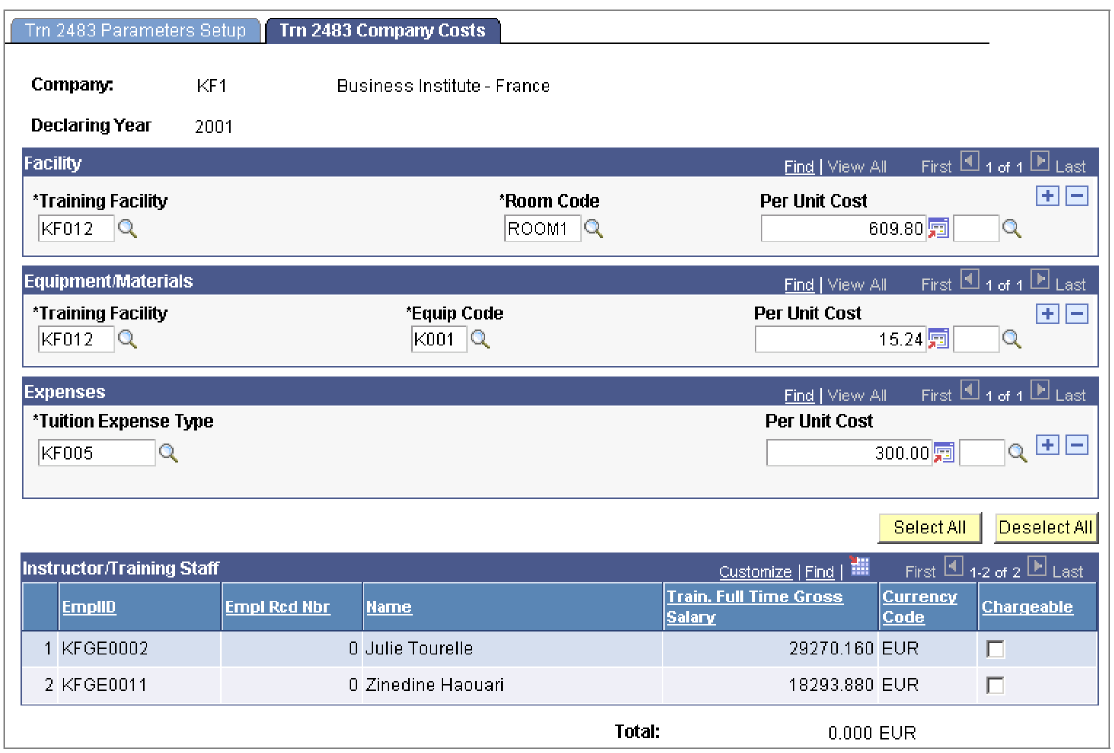
You can select Interface with Payroll System on the Trn 2483 Parameters Setup page and enter the applicable writable array fields. When Interface with Payroll System is selected, the system computes the amount by using data imported from the payroll system; the salary entry field is deactivated. The system uses the training writable array as an interface between the payroll system and Administer Training. When you install Global Payroll for France, the writable array is automatically populated when payroll is run. When another payroll system is installed, the writable array can be filled by this system and allow the training process to compute student salary costs and total compensation. Moreover, it is possible to disable the payroll interface and specify the annual total compensation amount directly on the Trn 2483 Parameters Setup page.

New Trn 2483 Company Costs Page

The Trn 2483 Company Costs page is a new page in the Trn 2483 Parameters Setup component that specifies costs that are fully chargeable to the 2483 report and are accounted for once yearly.

You can maintain the following training-related cost types for the:

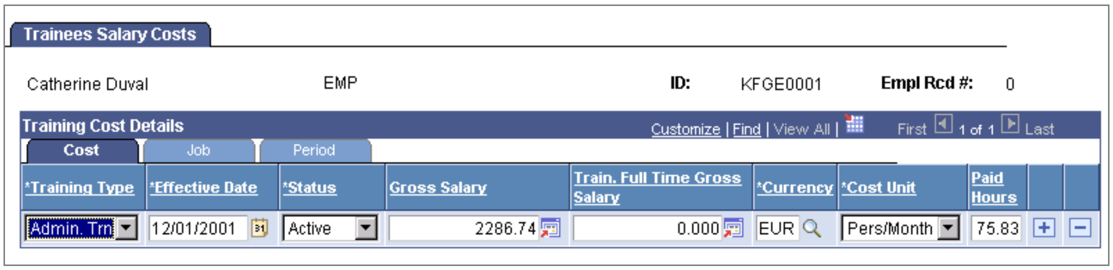
- Facility
- Equipment/Materials
- Expenses
- Instructor/Training Staff



Trn 2483 Company Costs page

Chargeable/Salary Costs Computation

To have better control of training costs that should be included in the 2483 report, and on the chargeable flag that is set at the course level, the chargeable flag now appears at both the student level and at the student cost level. The logic to compute costs based on compensation (i.e., student costs and Instructors) has been redesigned. The value for the Paid Hours cost unit is imported from the payroll system for accurate cost computation. The employee record number is now used in Administer Training. The system also determines if employee compensation should be fully reported or not on the 2483 report (i.e., student salary cost, full-time instructor, training staff employees).

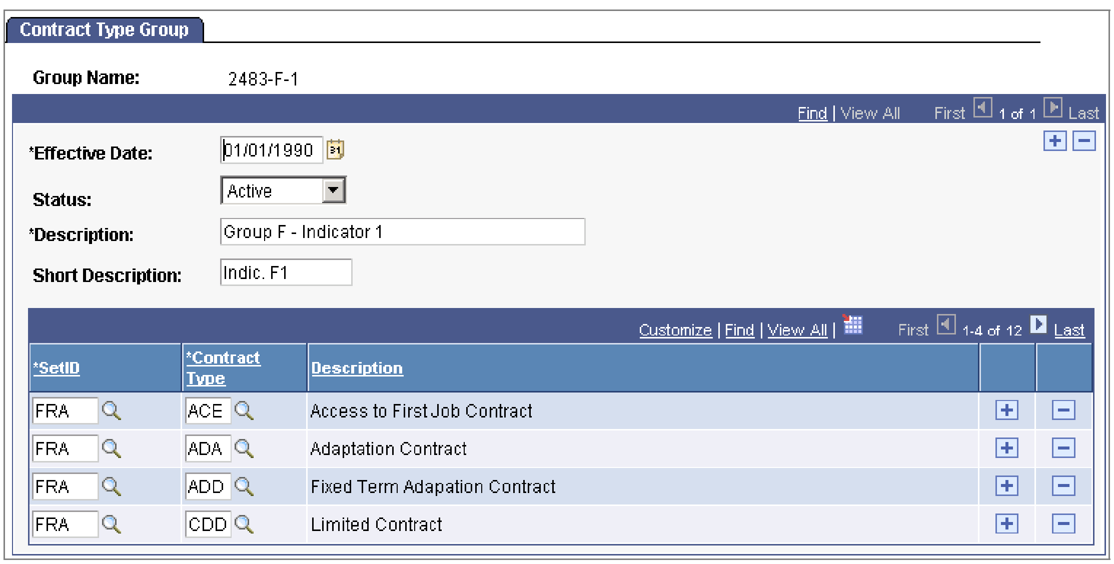


Trainees Salary Costs page

Rules have been implemented in Global Payroll for France to determine if an instructor and/or non-instructors are reported full-time.

Contract Type Group Specific for 2483

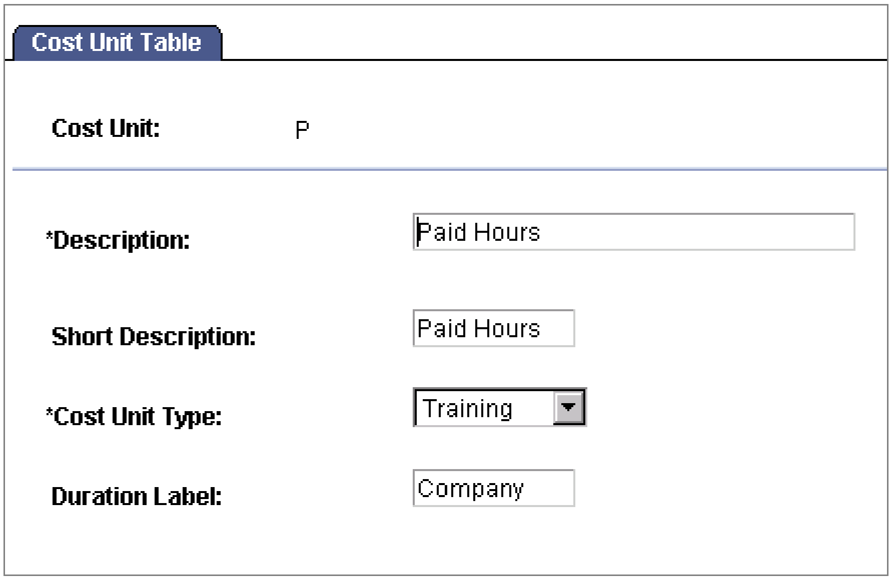
You can now customize the contract types that should be in the 2483 computation process for each relevant group/indicators:



Contract Type Group page

New Cost Units

The 'Paid Hours' cost unit now has enhanced computation for training costs based on compensation.



Cost Unit Table page

The ***Company*** cost unit determines costs that should be defined at the company level or at the student/session level.

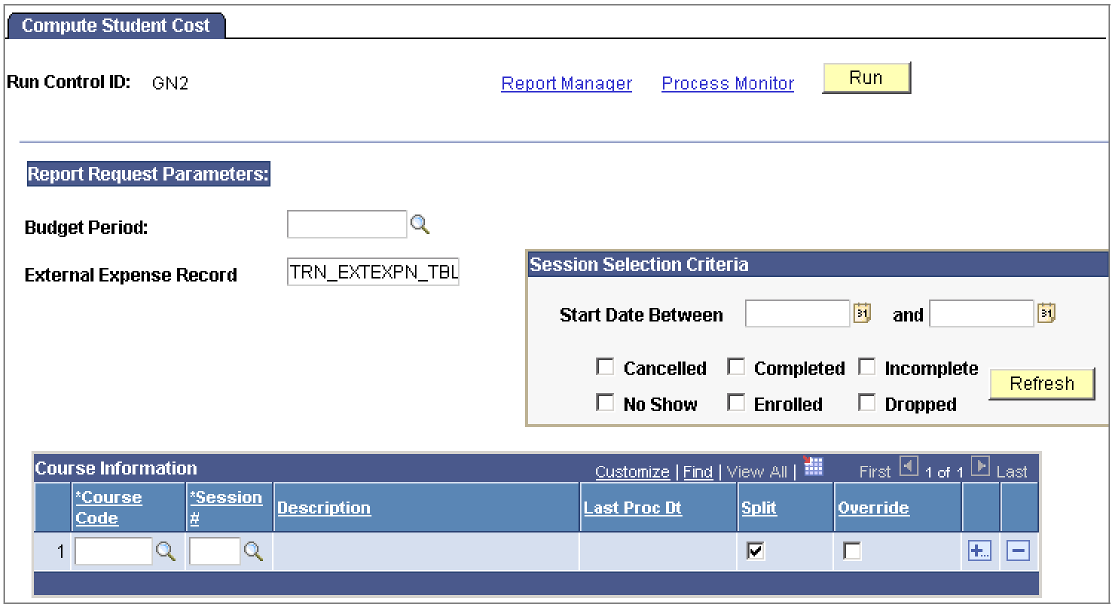
Compute Student Cost Page

Using the Compute Student Cost process for the 2483 Training Report, you can:

- Split session costs and compute the company cost, the financed cost, and the chargeable cost for each student.
- Update the employee salary costs.
- Determine if the cost is chargeable according to French regulation and set the chargeable flag on the Maintain Student Costs page.

  Then, if required, you can override the chargeable flag manually on the Maintain Student Costs page.
- Import external expenses.

  If an external system manages student expenses, it is possible to import these costs and have them be computed for the 2483 declaration.
- Use the new cost unit of 'Paid Hours' for salary computation.



Compute Student Cost page

The usability of this page has improved; you can now retrieve the session list in the system that requires computation.

Update Salary Cost

The Update Salary Cost page, formerly Populate EE Training Cost page is now enhanced with the following features in the French group box:

- WA (writable array) fields for Gross Salary, Training Gross and Paid Hours.

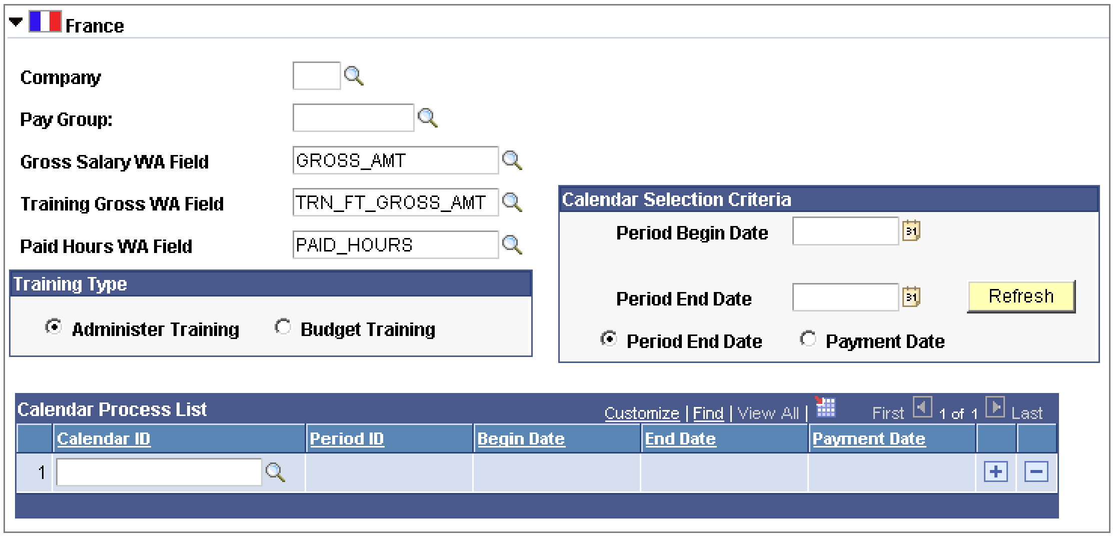
  The Update Salary Cost process will import the entry for this field from the WA value you select.

- Calendar Selection Criteria.

  Select the beginning and ending dates for which salary training costs will be computed.

- Calendar Process List.

  Select a calendar id to define the training period in which salary costs are defined.



Update Salary Cost page

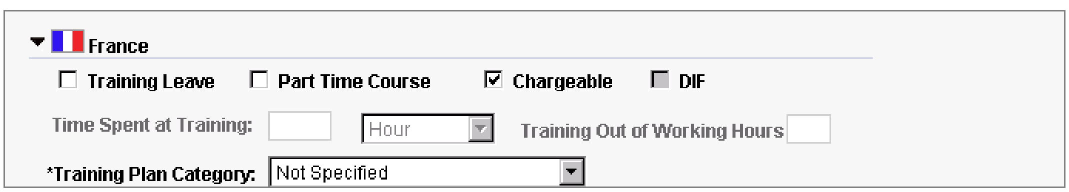
May 4th Training Law

In response to the May 4th training law, we have introduced the following new fields:

- Training Plan Category

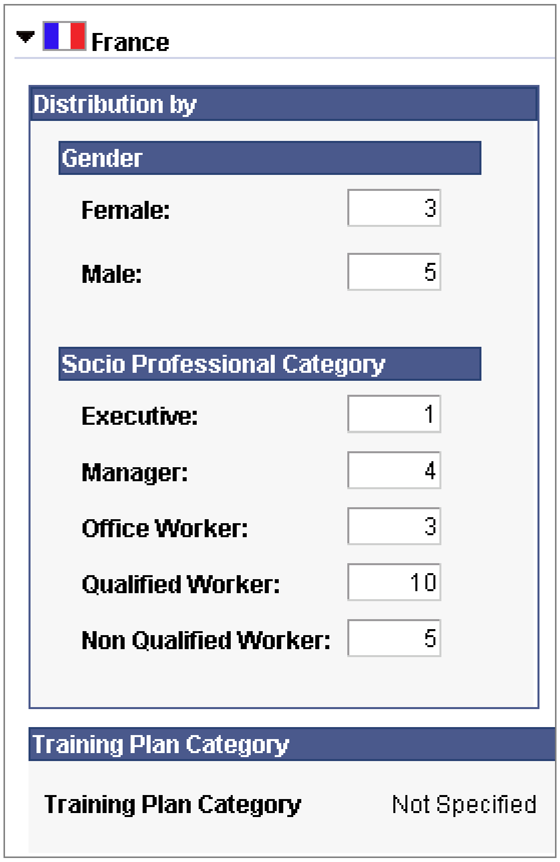
  Every training course can be defined into one of four categories: Skill development, Adaptation to Job change, Job preservation, and Not specified.

- DIF: Individual Training Right (Droit Individuel à la Formation): You can now calculate how many hours the employee gets for training purposes, according to seniority, contract type and hours worked.



Recording hours for training

- Training Out of Working hours: You can now specify how many hours the student spent at training outside the working time schedule.
- New contract type specific to training have been included in the system: Limited Profess Contract, Unlimited Profess Contract



Adjust Department Demand – Demands: Country page

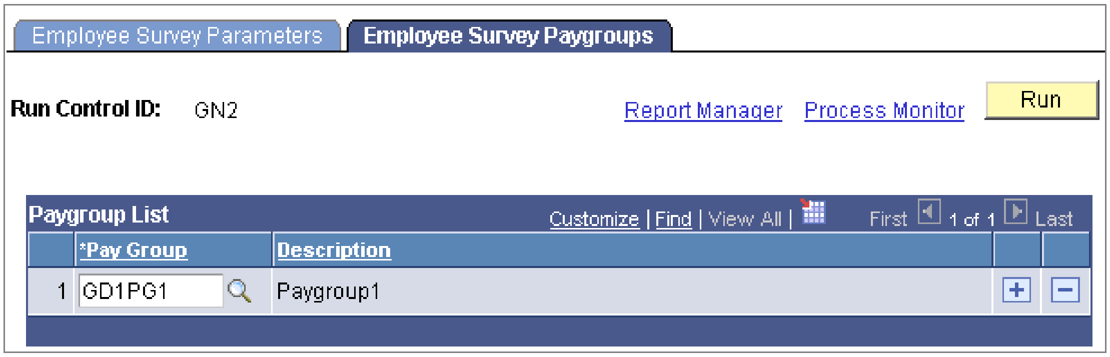
Employee Survey Report

Employee Survey, commonly called Bilan Social in French, is an annual regulatory report that the French government requires of employers with more than 300 employees. The Employee Survey reports an organization's last three years of activity by the means of nearly 200 indicators. These indicators are listed in seven groups defined by French regulations: job, compensation, health/safety, working environment, training, social relationships, and other. This report is presented and discussed before the Work Council. Because this report is quite complex, many companies are trying to produce it automatically.

As part of HRMS 8.9, we support our customer's Employee Survey requirements by:

- Adding indicators related to PeopleSoft Enterprise Global Payroll.
- Adding indicators related to the French Manage Profit Sharing business process.
- Rewriting absence indicators so that they report information out of the absence functionality in Global Payroll or Human Resources.
- Allowing users to choose the source of information and easily modify the computation.

- Adding a new page, Employee Survey Paygroups (RUNCTL_ENSURVEY2), that creates a list of paygroups to refine the results of the Compute Employee Survey process.



Employee Survey Paygroups page

Japan Enhancements

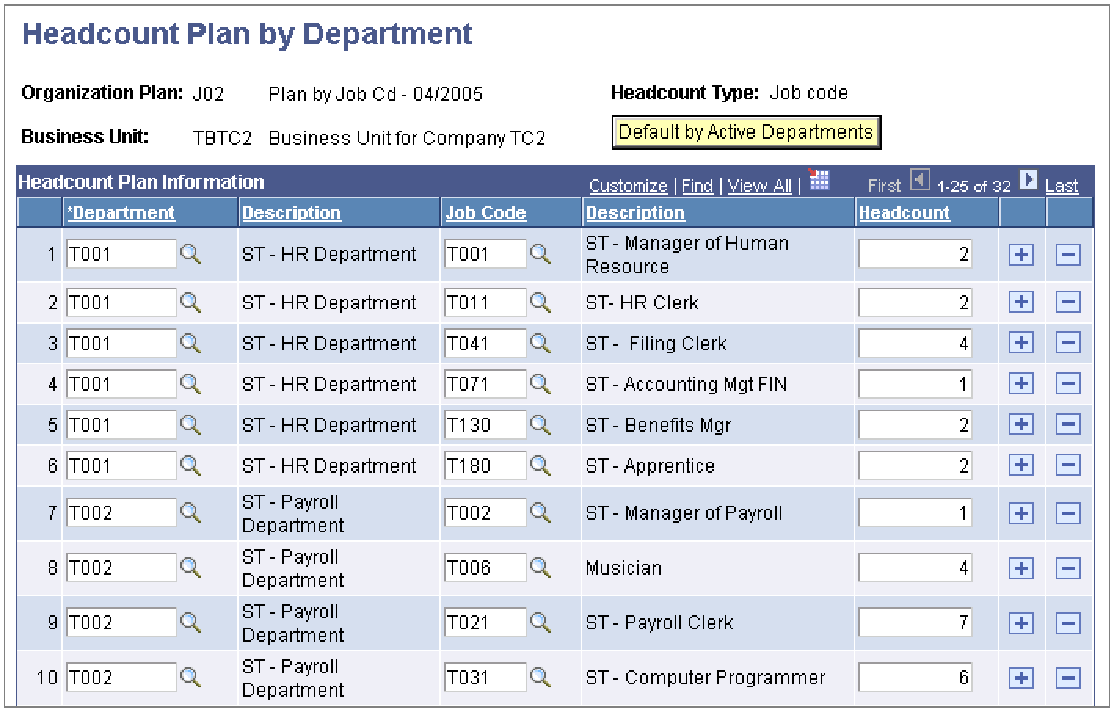
Human Resources 8.9 now includes a mass organizational change feature for Japan, which enables you to plan a new organization, create employee placement plans, and finalize the new organization and employee placement plans.

Planning a New Organization

When planning your new organizational structure, you may want to test more than one possible setup. Human Resources 8.9 enables you to store multiple patterns by merely changing the name of the structure. For each pattern you can experiment with department hierarchy, size by supervisor level, job code, grade, and many other attributes. You can even use the Tree Manager to copy and work from an existing setup. You are not bound by an organizational structure until you finalize the setup.

To help you focus on headcount goals, the system enables you to track headcount objectives by department.

Use the Headcount Plan by Department page to specify your targets. After your organizational structure is designed you can run the Headcount Plan Listing report to see if you have achieved the desired headcount.


Headcount Plan by Department

Organization Plan: J02 Plan by Job Cd - 04/2005

Headcount Type: Job code

Business Unit: TBTC2 Business Unit for Company TC2

Default by Active Departments

Headcount Plan Information — Customize | Find | View All | First 1-25 of 32 Last

	*Department	Description	Job Code	Description	Headcount
1	T001	ST - HR Department	T001	ST - Manager of Human Resource	2
2	T001	ST - HR Department	T011	ST- HR Clerk	2
3	T001	ST - HR Department	T041	ST - Filing Clerk	4
4	T001	ST - HR Department	T071	ST - Accounting Mgt FIN	1
5	T001	ST - HR Department	T130	ST - Benefits Mgr	2
6	T001	ST - HR Department	T180	ST - Apprentice	2
7	T002	ST - Payroll Department	T002	ST - Manager of Payroll	1
8	T002	ST - Payroll Department	T006	Musician	4
9	T002	ST - Payroll Department	T021	ST - Payroll Clerk	7
10	T002	ST - Payroll Department	T031	ST - Computer Programmer	6

Headcount Plan by Department page

Creating Employee Placement Plans

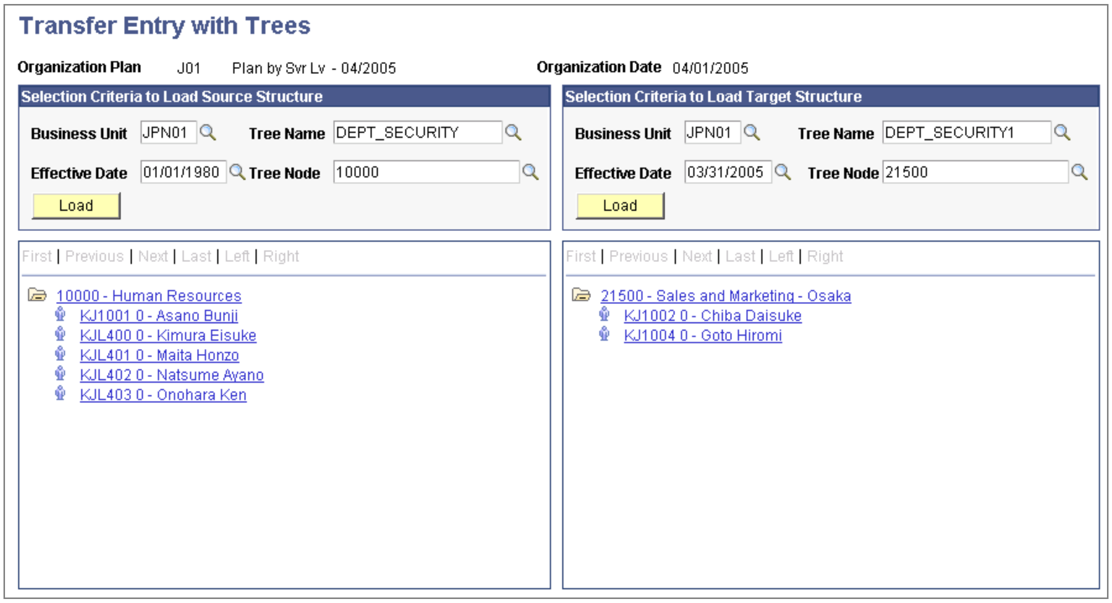
Human Resources 8.9 provides you with the functionality to transfer employees from one department to another or to move employees using trees. The application also enables you to plan for Tamatsuki transfers.

The Transfer Entry by Department page can transfer multiple employees from one department to another. Choose the employees to transfer in the Employee Information group box. Use the Change the Following Fields group box to enter the transfer information.

Transfer Entry by Department page (1 of 2)

Transfer Entry by Department page (2 of 2)

You can accomplish the same results using the Transfer Entry with Trees page. This page enables you to see the target department.



Transfer Entry with Trees page (1 of 2)

Transfer Entry with Trees page (2 of 2)

To process Tamatsuki transfers, the system enables you to specify a list of Tamatsuki candidates, assign candidates to posts, and report planned transfers.

Finalizing the New Organization and Employee Placement Plans

In order to finalize organization and employee placement plan, the system provides a number of checks to ensure that the intended structure is correct. These include checks for organization, employees, and departments. Human Resources 8.9 provides reports for the HR administrator to review before accepting the organization changes. These reports list:

- Employees that will be in inactive departments.
- Headcount of the new organization.
- Employee assignments.
- A summary of organizational changes.

PeopleSoft Enterprise Compensation Enhancements

With PeopleSoft HRMS 8.9, we are delivering the foundation of a robust compensation solution. The elements we're delivering in 8.9 are the beginning of an ongoing investment in our compensation business processes and provide functionality that gives you greatly enhanced flexibility and administrative efficiencies to support the administration of even the most complex compensation plans.

The new features we've to our Compensation business processes are:

- Population management
- Configurable matrices

Population management and configurable matrices have been designed for the compnesation solutions but may have broader applications in future releases.

Using the new features and enhancing existing functionality we have also made other changes to our compensation business processes:

- Renamed PeopleSoft Human Resources Plan Salaries.
- Market pay.
- Budget enhancements.

Plan Salaries (Salary Planning) to Manage Base Compensation and Budgeting

We renamed Human Resources Plan Salaries to better reflect the nature of the functionality.

The enhanced business process, PeopleSoft Human Resources Manage Base Compensation and Budgeting, includes the following business processes:

- Salary administration plans.

  Create salary administration plans to assign default compensation packages to workers at the location, job code, or worker level. Use these salary plans to move workers through step increases manually or automatically.

- Base compensation budgets and plans. (This feature has been significantly enhanced for 8.9).

  Create base compensation budgets for groups of workers by defining increases for pay components. The system calculates the increase for all workers in the group who have the component in their compensation package. You can define budget increases by effective date, effective sequence, action, and action reason and compare multiple proposed budgets for a given group and budget period.

- Mass salary increase processes to update salaries.

  Implement mass salary increases by salary plan and pay group or by job codes.

- Summary data and reports.

  Inquire and report on:

  - Salary plan and grade structures.
  - Worker compensation history and summaries by worker, group, company, and department.
  - Worker review summaries and distribution analysis.

Population Management

Population management enables you to organize your people into a hierarchy, giving you a visual representation of the relationship between managers and their staff. This provides a simple, intuitive way to manage large populations and identify the managers and staff relationships required to support business processes like compensation. From the hierarchy, you can easily create groups in Group Build that reflect the compensation hierarchy you created.

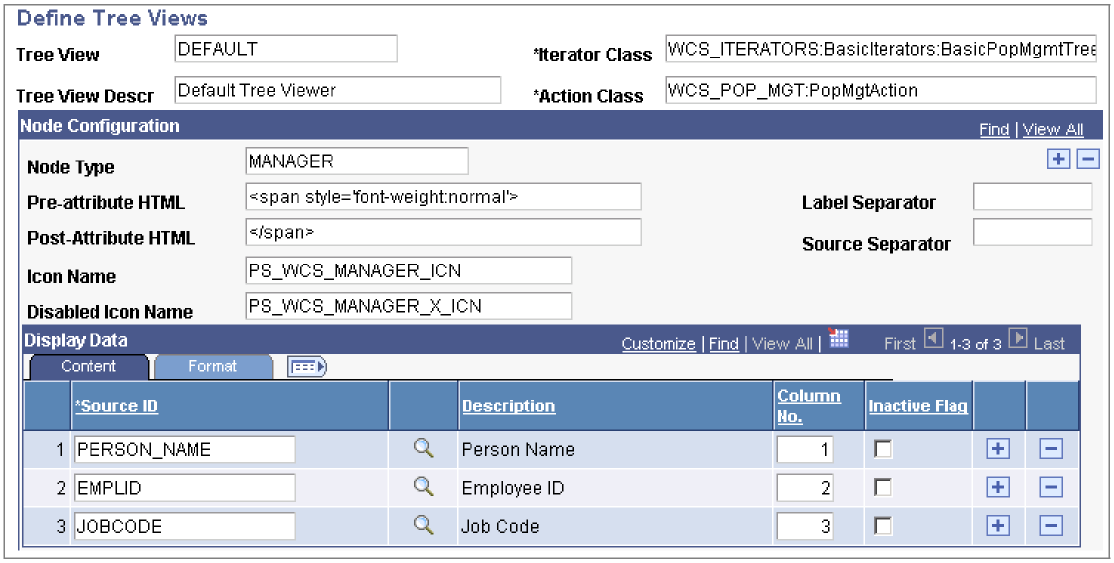
The new functionality is easy to use and doesn't require any knowledge of the PeopleSoft data structure. Simply define one or more tree views to determine what the users will see when they create a tree and then your users can generate a compensation tree automatically based on the direct-reports relationship they select.

Once you create a tree, you can save it as is, move people around, create groups in Group Build based on the tree structure with a push of a button, view people's compensation and job data, and manage various compensation processes.

Population management does not replace Manage Variable Compensation's tree functionality so you can continue to use the trees you have already created.

Define Population Management Tree Parameters

Before creating a compensation tree, you create custom views to determine the data displayed (for example compensation data, work data, job data, position data, and so on) for the people captured in the tree. This allows you to launch specific transactions from a node, or directly navigate to a specific PeopleTools component and page from a node.

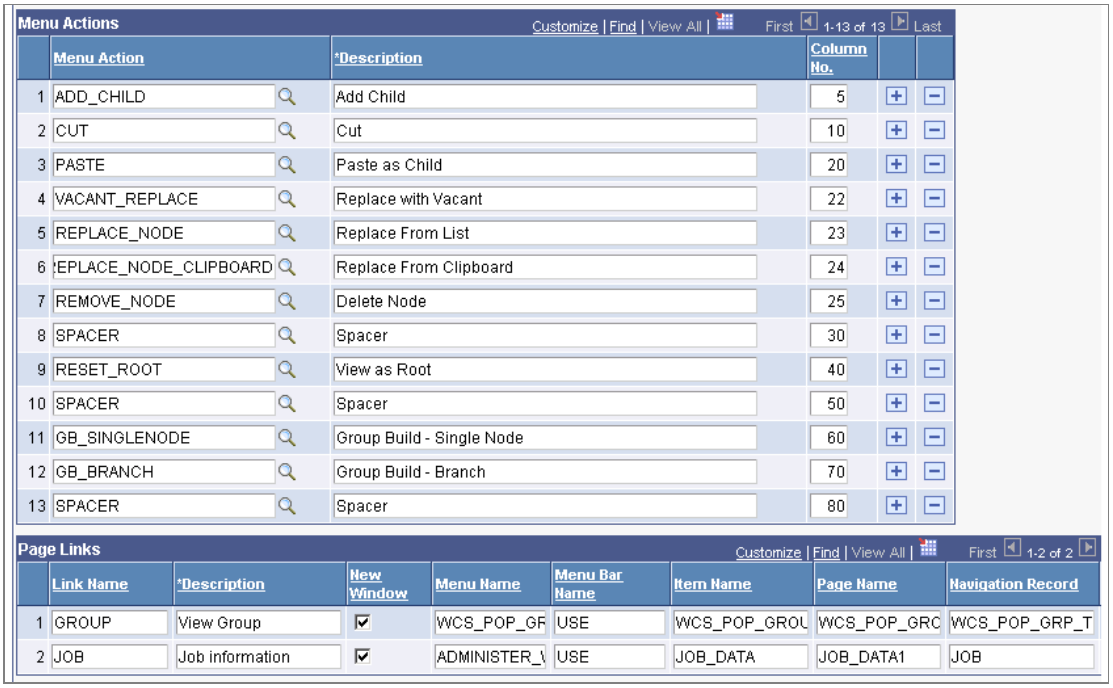


Defining different tree views

Views apply to the tree as a whole, but you can set different actions and data display parameters at the node level. Nodes are the levels on the tree, with the root node at the base of the tree, representing the manager upon whom the tree is based. A manager node represents a person who has nodes under them, representing a manager, and an individual node represents a person with no staff (and so no nodes underneath them).

When you define the context and actions available for a node, you can set different options for different nodes. For example, you may only want to show the name of the person at the root node but at the manager and individual nodes, you could opt to add menu options that enable users to access the person's job data record or create a group based on the node. For each node type, configure the display data, menu actions, and page links appropriate for that level.

The menu actions and page links you select for a node are made available on the context menu in the population tree. You can select from twenty-one different menu options and select different options for different nodes. For example, you may want to be able to create groups at the manager level but not at the individual level. To do this, select one or more of the Group Build menu options for the MANAGER node type but not for the INDIVIDUAL node type.



Menu Actions — Customize | Find | View All — First 1-13 of 13 Last

	Menu Action	*Description	Column No.
1	ADD_CHILD	Add Child	5
2	CUT	Cut	10
3	PASTE	Paste as Child	20
4	VACANT_REPLACE	Replace with Vacant	22
5	REPLACE_NODE	Replace From List	23
6	!EPLACE_NODE_CLIPBOARD	Replace From Clipboard	24
7	REMOVE_NODE	Delete Node	25
8	SPACER	Spacer	30
9	RESET_ROOT	View as Root	40
10	SPACER	Spacer	50
11	GB_SINGLENODE	Group Build - Single Node	60
12	GB_BRANCH	Group Build - Branch	70
13	SPACER	Spacer	80

Page Links — Customize | Find | View All — First 1-2 of 2

	Link Name	*Description	New Window	Menu Name	Menu Bar Name	Item Name	Page Name	Navigation Record
1	GROUP	View Group	☑	WCS_POP_GF	USE	WCS_POP_GROU	WCS_POP_GRC	WCS_POP_GRP_T
2	JOB	Job information	☑	ADMINISTER_\	USE	JOB_DATA	JOB_DATA1	JOB

Viewing and changing delivered menu actions used in the Context menu

Create and Maintain Population Management Trees

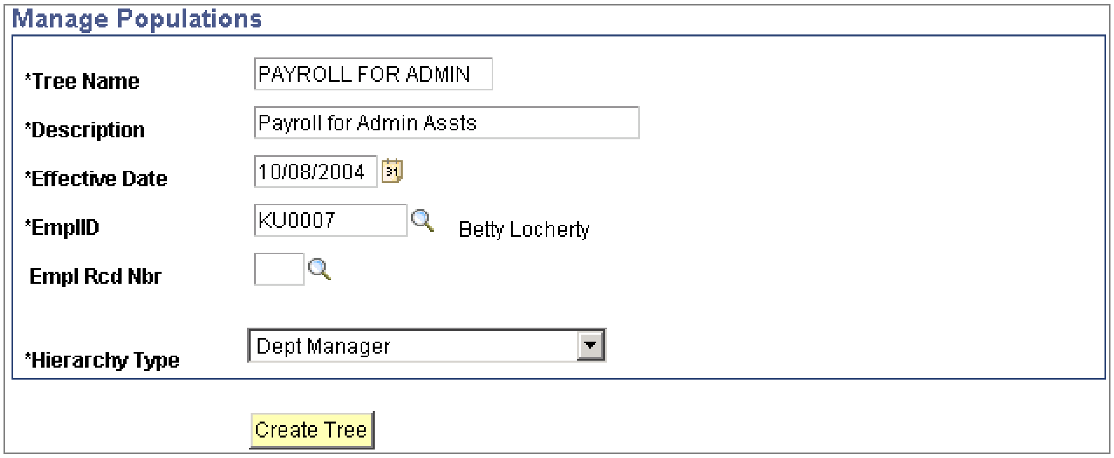
To create a population tree, you select the person that will be the top of the population tree and the specific type of direct-reporting relationship that you want to use to build the hierarchy.

Population management trees are based on one of the following five relationships established elsewhere in Human Resources:

- Department manager (as entered on the Departments component).
- Reports to position (as defined in Manage Positions).
- Supervisor ID (as entered on the Job Data – Job Information page).
- Partial position management and department manager.
- Partial position management and supervisor.

The two partial position management options enable you to create a single tree for a population in which only some members are managed by position. The options use the hierarchy established in Manage Positions for those people to whom it applies and either the department manager or supervisor for those individuals not managed by position.

If a person’s department, job, or position does not have manager or supervisor information, the system will not drop them from the hierarchy, but place them on a node indicating that they are missing information.



Creating a population tree

For example, to create a population tree made up of the reports of Betty Locherty enter Betty's EmplID in the Manage Populations Create Tree page. Using the department manager field on the Department Profile page, the system will construct the tree beginning with Betty's direct reports (those individuals in the department Betty manages). If any of Betty's direct reports are department managers, their staff is also included, and so on down the line.

After entering all required information, click the Create Tree button. The system will create the tree and display it.

The system creates the tree with a default view. You can associate a different tree view with the tree to change the options you can access from the tree.

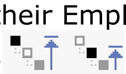
The tree based on Betty Locherty shows all of the people in the department that Betty manages. Rosanna Channing and Sylena Tyler also manage a department and, when expanded, the people in their departments are shown.

The system generates the tree using the reporting option and tree view that you select.

You can either save the tree as is or make manual changes to the structure to reflect future manager/staff relationships. For example, you may have one tree to support the view of the organization on June 1st, for bonus payments, and another view that is effective on January 1st, to support the merit review process.

The features of the tree allow you to manage and manipulate the data, and save it. You can cut and paste workers between nodes of the tree, easily realign people, add people to the tree and remove entire branches. You can save different versions of the tree representation and compare them. These changes are within the tree only, and do not reflect the tables (position or job data) upon which the tree is based.

You can apply predefined queries to the population and the system will show you which workers (nodes) match the query and which do not. This allows you to apply filters to refine the selected population. In addition, you can create groups of workers from any branch of the tree. These groups can then be used in other Human Resources business processes such as Base Compensation and Budgeting.

And finding people on a population tree is easy; you either search for them using their EmplID and ERN combination or navigate the tree using the navigation icons ().

Create Groups in Group Build from a Population Tree

In previous releases of HRMS, you had to create all compensation groups in the Group Build pages. These pages require a level of knowledge of PeopleSoft and the system data structure that most functional users don't usually have.

Population management has made creating compensation-based groups incredibly simple. From within the population tree, simply choose the person upon whom you want to base the group and select a Group Build option from the context menu and PeopleSoft and Group Build do the rest. Once created, all you have to do is determine who has security access to these groups and they are ready for use in the PeopleSoft compensation modules.

There are five Group Build menu options that you can include on a context menu. When you define the tree view, select the options you want to make available to that node type in the population tree. Once in the tree, select the node upon which you want to base the compensation group and select the Group Build option from the context menu.

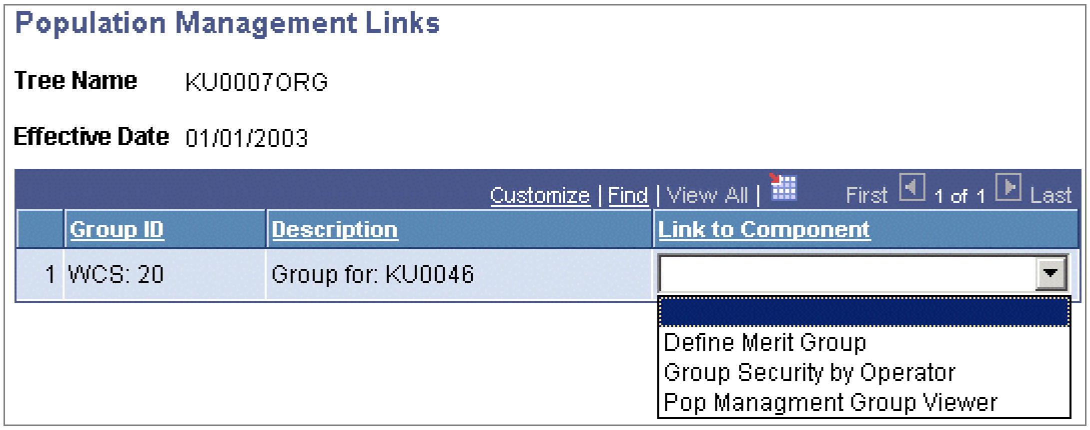
Create groups based on a:

- Single Node: The system creates a group consisting only of workers directly reporting to the manager node that was used.
- Branch: The system creates groups for every manager node reporting to the selected manager and one group consisting of all the people directly reporting to the selected manager.

Use the Process Merit group build option to generate groups to process merit pay.

For both the single node and branch Group Build options, you have the option to create the group *excluding* the manager since managers may need to manage the compensation data of their staff but should not be able to manage their own data. Or you can opt to create the groups *including* the manager. These options provide you with the flexibility to manage your employee population to support the requirements of your compensation or other HCM business processes.

When you select a group build menu item, the system creates the group in Group Build and displays the Population Management Links page in a new window that shows the group that was built. The group ID is automatically generated as WCS (Workforce Compensation Solutions), followed by a unique sequence number. The group description is automatically generated with the employee ID of the manager node upon which the group was based.


Population Management Links

Tree Name KU0007ORG

Effective Date 01/01/2003

Customize | Find | View All | First 1 of 1 Last

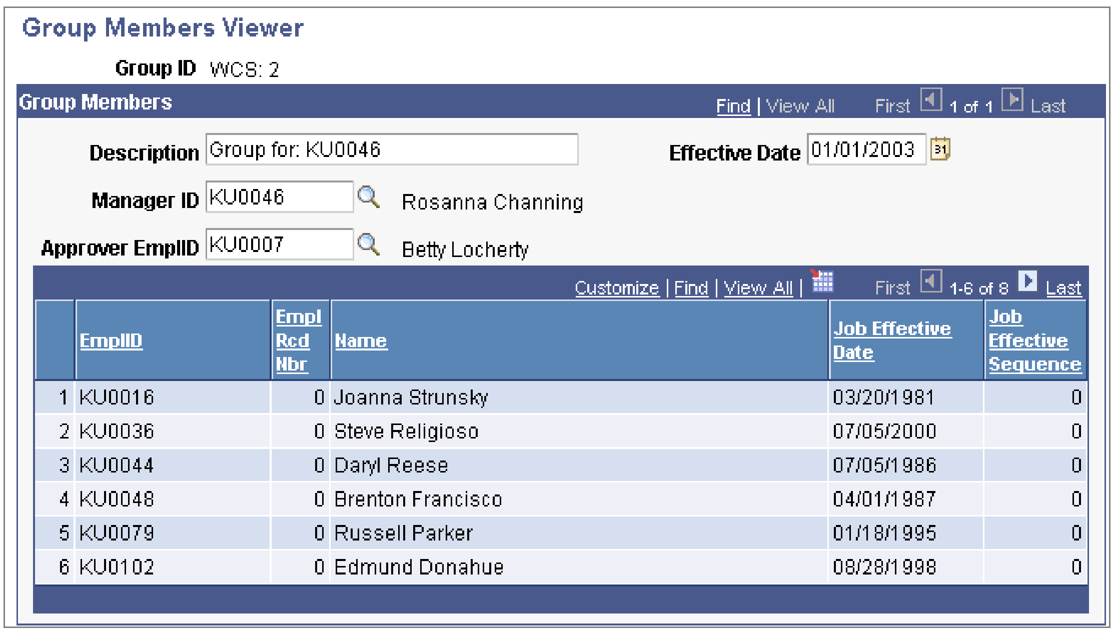
	Group ID	Description	Link to Component
1	WCS: 20	Group for: KU0046	

Define Merit Group
Group Security by Operator
Pop Managment Group Viewer

Creating a group using the Group Build - Branch option from the Context menu

From this page you can access components to manage the group (for example, set up security for it) or use the group in a compensation process.

In Group Build, the group is created automatically:


Group Members Viewer

Group ID WCS: 2

Group Members — Find | View All First 1 of 1 Last

Description: Group for: KU0046 Effective Date: 01/01/2003

Manager ID: KU0046 Rosanna Channing

Approver EmplID: KU0007 Betty Locherty

Customize | Find | View All | First 1-6 of 8 Last

	EmplID	Empl Rcd Nbr	Name	Job Effective Date	Job Effective Sequence
1	KU0016	0	Joanna Strunsky	03/20/1981	0
2	KU0036	0	Steve Religioso	07/05/2000	0
3	KU0044	0	Daryl Reese	07/05/1986	0
4	KU0048	0	Brenton Francisco	04/01/1987	0
5	KU0079	0	Russell Parker	01/18/1995	0
6	KU0102	0	Edmund Donahue	08/28/1998	0

When you select a Group Build option in a compensation tree, PeopleSoft Group Build creates the group based on the tree structure you create and saves it

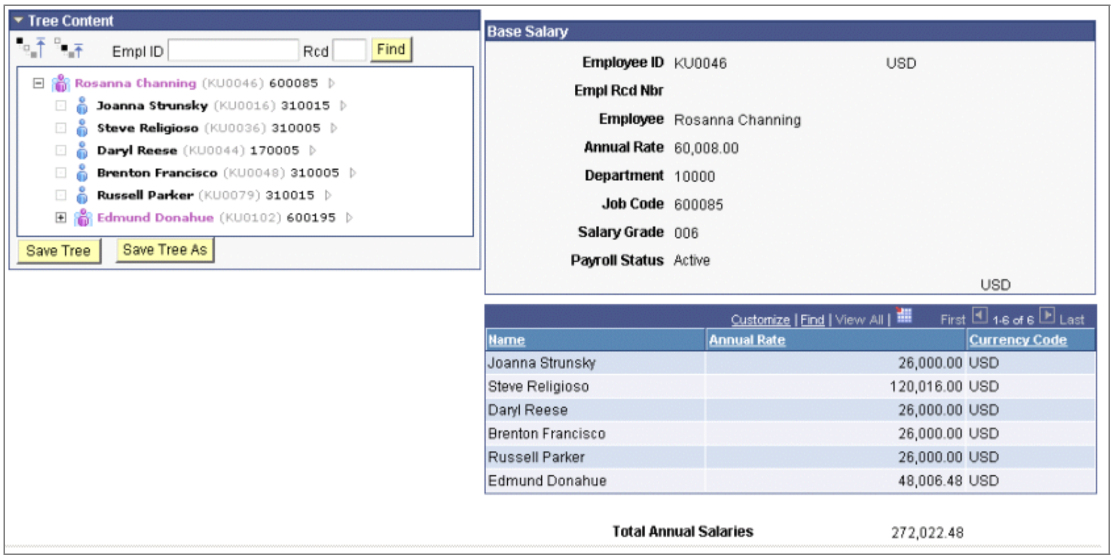
You can use these groups directly in the group increase and merit increase compensation processes.

For example, to create a group that includes the people who report to manager Rosanna Channing, select her node and from the context menu select Group Build – Single Node. The system creates a group that includes everyone under Rosanna Channing (but not their subordinates, if there are any) on the population tree, but does not include Rosanna herself.

If you were to move Daryl and Russell, two of Rosanna's staff members, to another part of the tree, and place Stanley under Rosanna and recreate the group, it would not include Daryl and Russell but would include Stanley.

View Base Compensation and Group Budgets

Click the name of a worker to access other view options such as base salary. This page enables you to view base compensation information for an individual or for a manager and all direct reports of the manager.



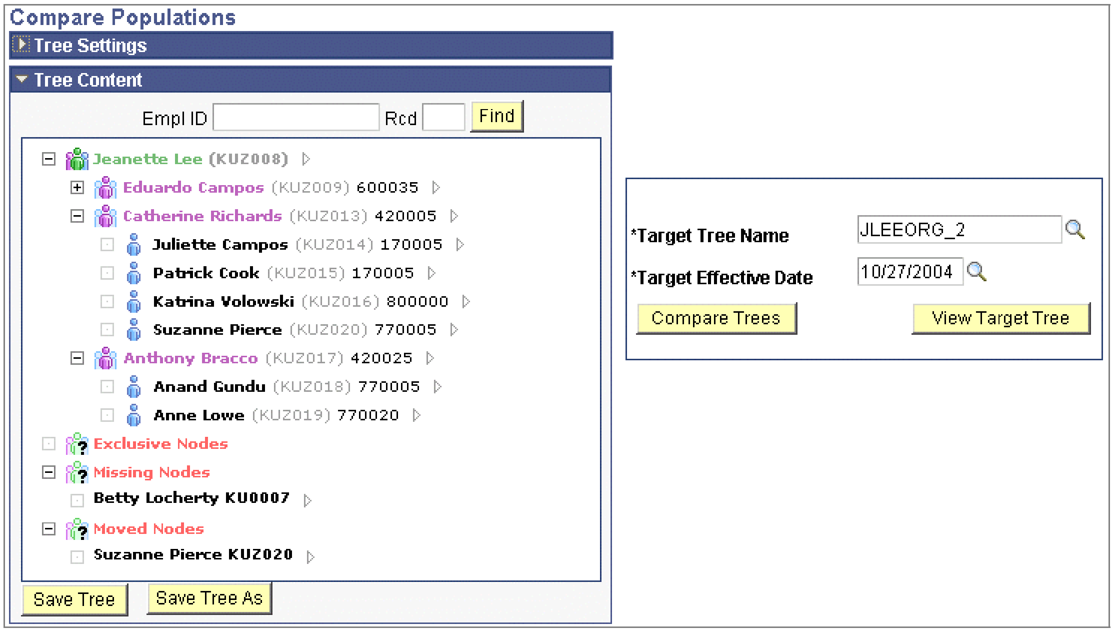
Viewing base compensation information

To view a group's budget, simply click the name of the manager upon which the group is based.

Compare Two Population Trees

Population management enables you to compare the populations of two trees, whether they're based on different hierarchy types, different versions of the same tree (for example, the unmodified version versus one that has been changed around to reflect compensation realities), or a future and current tree.

The process highlights nodes missing from the current tree (Missing Nodes), present in the current tree but missing in the target tree (Exclusive Nodes), and nodes that have moved (Moved Nodes).



Viewing the comparison results from two population trees: workers who have moved or missing are indicated.

This functionality enables you to manage and account for changes in budgets and analyze other, compensation-related changes in your organization.

Configurable Matrices

Past releases of PeopleSoft compensation business processes have provided hard-coded matrices to track things such as salary ranges in a salary plan. With release 8.9, we introduce new functionality that enables you to create custom matrices to use instead or in addition to the earlier versions. Once created, you can use matrices to manage compensation related information for job codes, rate codes, and group budgets.

Configurable matrices provide powerful flexibility in defining tables to support different business processes and rules. Using a concept of identifying sources (inputs) and results (outputs), you can define tables with flexible dimensions (number of columns and rows) to support your unique business needs:

- Define the sources of information for the input of information into in your matrices.
- Define result types to use for the output of information into your matrices.
- Create as many matrices as you need. For each matrix, define the:
    - Rows and columns, including labels and prompts.
    - Select the input and output criteria from the information sources and result types you defined.
    - Select the input and output values.
    - Search keys to match worker data.

- Associate matrices with salary plans, job codes, and individuals as needed.

PeopleSoft Enterprise Human Resources delivers sample configurable matrices, and it is possible for you to use these samples as models for your own or create new matrices from scratch to support your business needs. This flexibility enables you to create from the most simple of matrices to much more complex designs.

Configurable matrices for compensation related data is just the beginning. In releases to come, we will continue to expand on this functionality and make it available in other business processes.

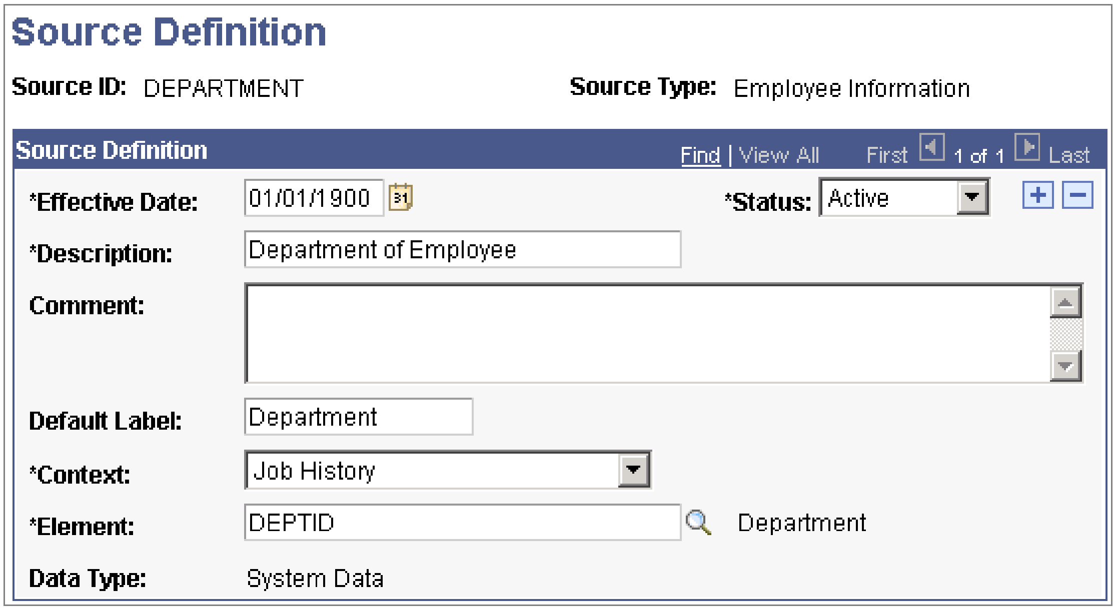
Define Sources for Configurable Matrices

To begin using this powerful feature, you must first define sources (inputs) for your configurable matrix against which you will evaluate a specific worker. PeopleSoft Enterprise Human Resources delivers 13 predefined source types upon which you can base source IDs on:

- Addresses
- Dates
- Ratios
- Performance ratings
- Employee information
- Related employee information
- Position information
- Related position information
- Geographical areas
- Salary grade step rates
- Length of time
- Supplied information
- Matrices

You can create a source that refers to any address type (home, work, mailing, and so on) and any field (address line, city, state, country) on the address or a source that refers to fields from a worker's job data records.

For example, this DEPARTMENT source uses the department the person is assigned to on the Job Information page as a source of input data.

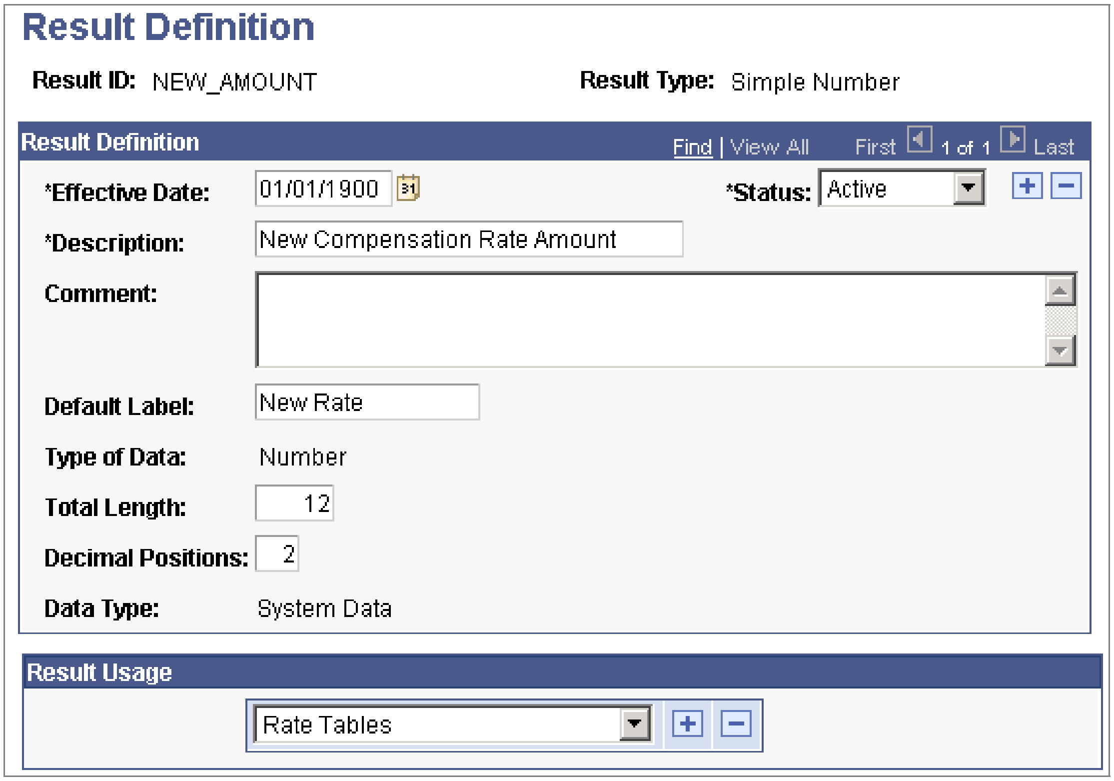


Defining a source based on the Employee Information source type

Define Results for Configurable Matrices

Results are the outputs for your configurable matrix. A result ID is simply a standardized name for one of the outputs from a matrix. By using names, the applications and components that query a matrix can know what set and type of results to expect back after they perform a lookup. For example, if you expect to get a percentage value back, the name PERCENTAGE is more intuitive than NUMBER1. If you expect to get an amount that represents a compensation rate, the name COMPRATE is better than just AMOUNT.

PeopleSoft Enterprise Human Resources supplies system-delivered result IDs, but you can also create new ones.



Defining results (outputs) based on the Simple Number result type

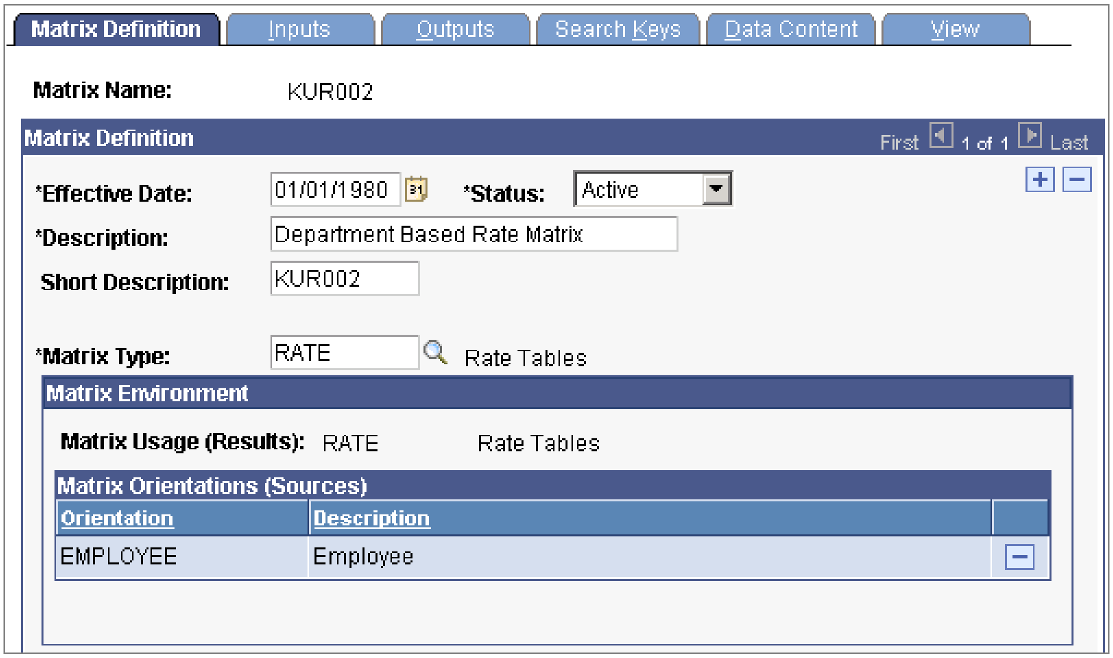
This result type will use the number entered as an amount to be applied to another result. It requires you to specify the target Result ID to which this amount will be applied. You can enter both positive and negative numbers, so you can increment or decrement the target value. For example, assume that you have a matrix for calculating rates based on Department. Each department has a fixed base rate (which can vary by department). However you want to calculate the final rate as an increment of the base rate. In this case you will have one Result ID called Base Rate (of type SIMPLENUM), and another Result ID called Final Rate (of type INCRBYAMT).

Define the Configurable Matrix

After you have defined the sources (inputs) and results (outputs) for your configurable matrices, you can configure matrices for your organization.

On the Matrix Definition page, indicate what type of matrix this will be, how it will be used and where matrix information will be associated with the person.

In this example, the matrix is a salary increase matrix and the salary information will be associated at the employee level:

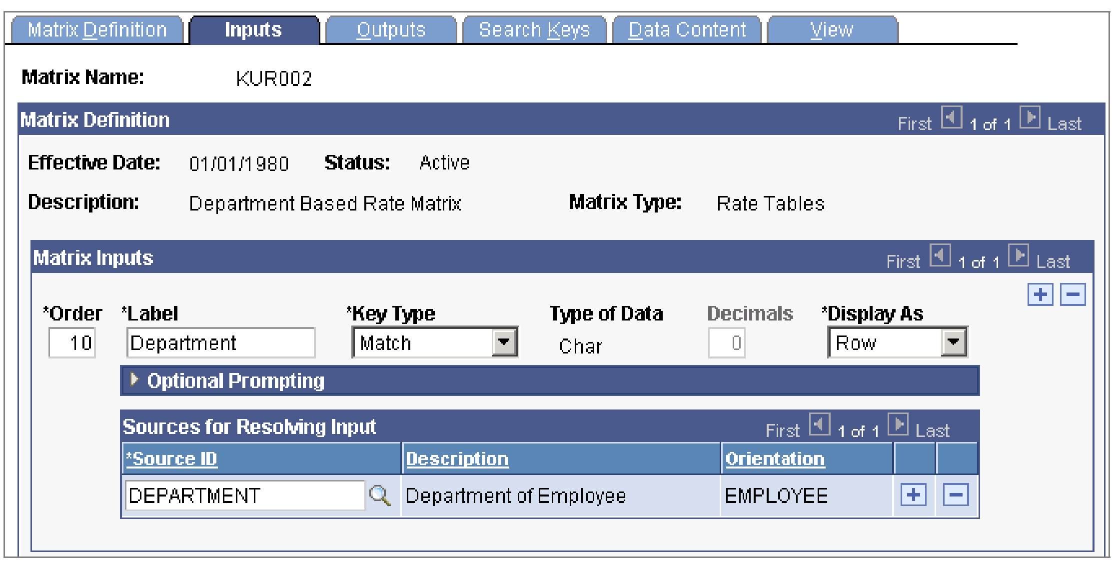


Defining the configurable matrix based on a specific matrix type

Define the Inputs for the Configurable Matrix

Define the input columns and rows, including the labels, order, source of the input data, and rules.

This matrix has two input definitions, a row and a column. The source of the row information is the person’s performance rating and the column source is the position in the range of performance ratings.



Defining the inputs

Enter the numerical value to indicate the order in which the inputs should appear in the configurable matrix. This will also determine the order in which the inputs are evaluated against the worker data.

Select the method that dictates which breakpoint (range) the system should consider as a match. Values are:

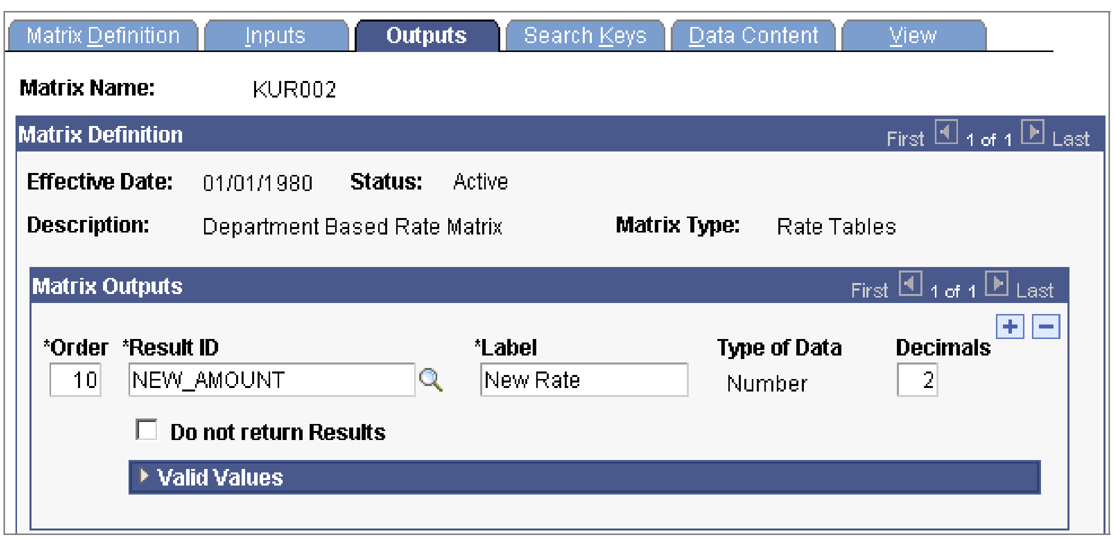
- **Use Higher Limit:** The system retrieves the matrix data for the breakpoint higher than the input value.
- **Use Lower Limit**: The system retrieves the matrix data for the breakpoint lower than the input value.
- **Use Nearest Limit**: The system retrieves the matrix data for the breakpoint closest to the input value.

When Outside Range: Select one of these values to determine which value the system returns:

- Use First Limit if Under: Use this option if you want the system to consider the first breakpoint a match for all values lower than the first breakpoint. For example, if the worker had percent-in-range of 20%, it would use "40" if this check box was selected. If the box is cleared, the system will find "no match" for that input.
- Use Last Limit if Over: Use this option if you want the system to consider the last breakpoint a match for all values higher than the last breakpoint. For example, if the worker had percent–in–range of 120%, the system would use "100" if this check box was selected. If the box is cleared, the system will find "no match" for that input.

Define the Outputs

Define the matrix output information. These definitions determine the results displayed in your matrix.

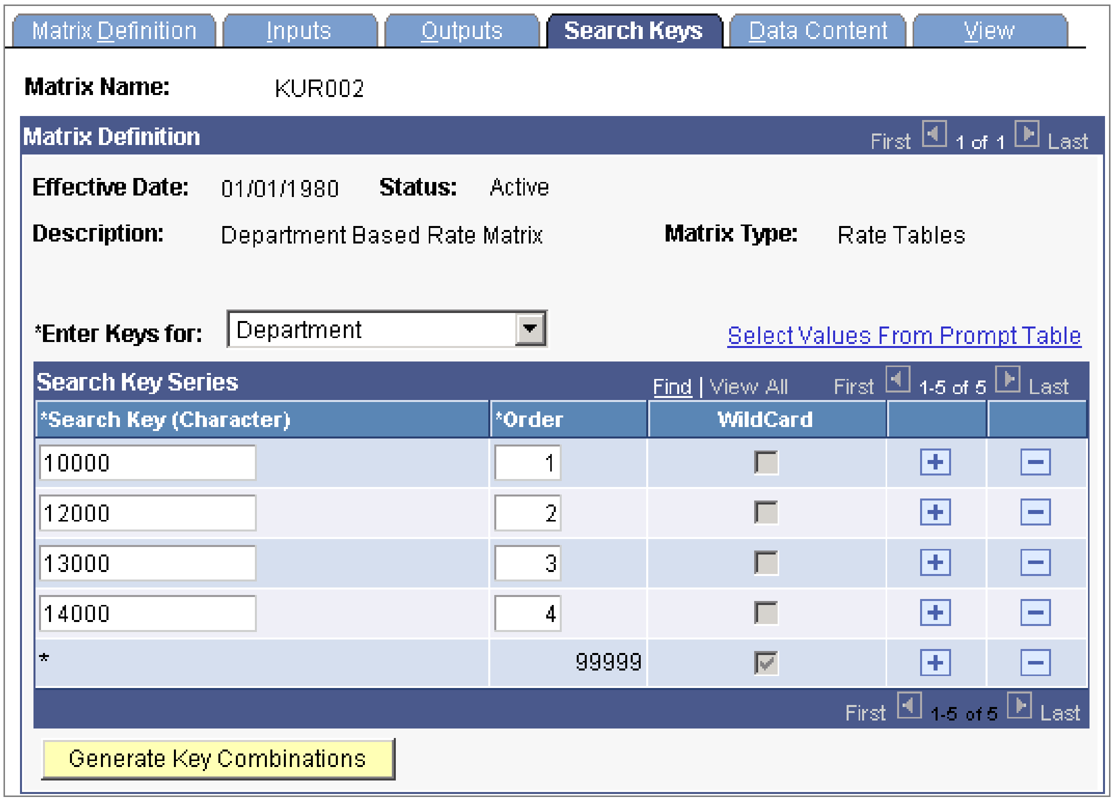


Defining the outputs for your configurable matrices.

Select the Do Not Return Results check box if the result is to be used as a reference only for a calculation in another result. For example, if you have a PCNTOFBASE type result which uses BASERATE as its reference, you can set this check box on the BASERATE result ID. This means that the calling program will only receive PCNTOFBASE as an output result ID. It will not receive any other output from the matrix.

Enter the Data Content Values

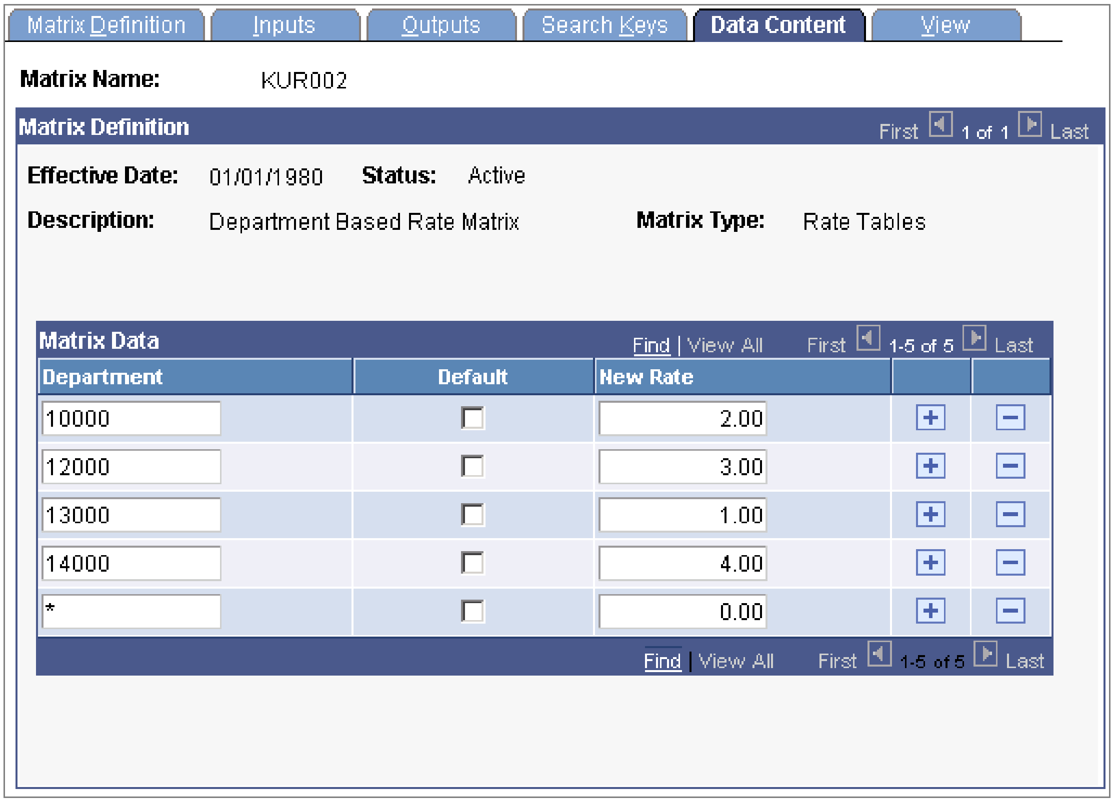
Use this page to enter the key values against which worker data is matched. In the previous example, the system will check the worker's department against those selected here.



Entering search key values

Enter Data Content Keys

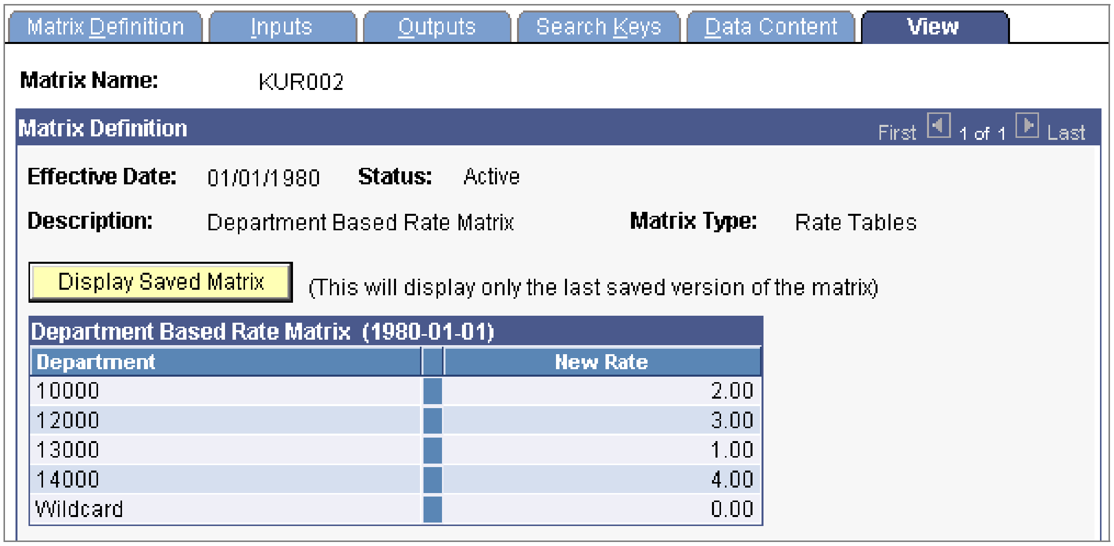
This page lists the combinations of search keys for all inputs that the matrix will evaluate. For each combination, it lists all outputs fields. You can add the character, date, or numerical values of each output here.



Entering data content values for the matrix

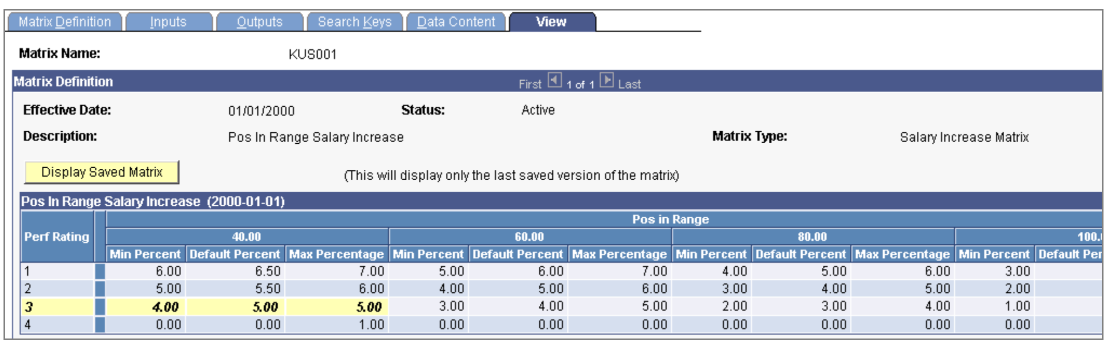
View the Matrix

Once you've defined the matrix parameters, view the results to ensure the matrix accurately captures the information you need.



Department	New Rate
10000	2.00
12000	3.00
13000	1.00
14000	4.00
Wildcard	0.00

Viewing the department based rate matrix after you've defined it.



Perf Rating	Pos in Range										
	40.00			60.00			80.00			100.	
	Min Percent	Default Percent	Max Percentage	Min Percent	Default Percent	Max Percentage	Min Percent	Default Percent	Max Percentage	Min Percent	Default Per
1	6.00	6.50	7.00	5.00	6.00	7.00	4.00	5.00	6.00	3.00	
2	5.00	5.50	6.00	4.00	5.00	6.00	3.00	4.00	5.00	2.00	
3	4.00	5.00	5.00	3.00	4.00	5.00	2.00	3.00	4.00	1.00	
4	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Viewing a salary range matrix after you've defined it

Copy a Configurable Matrix

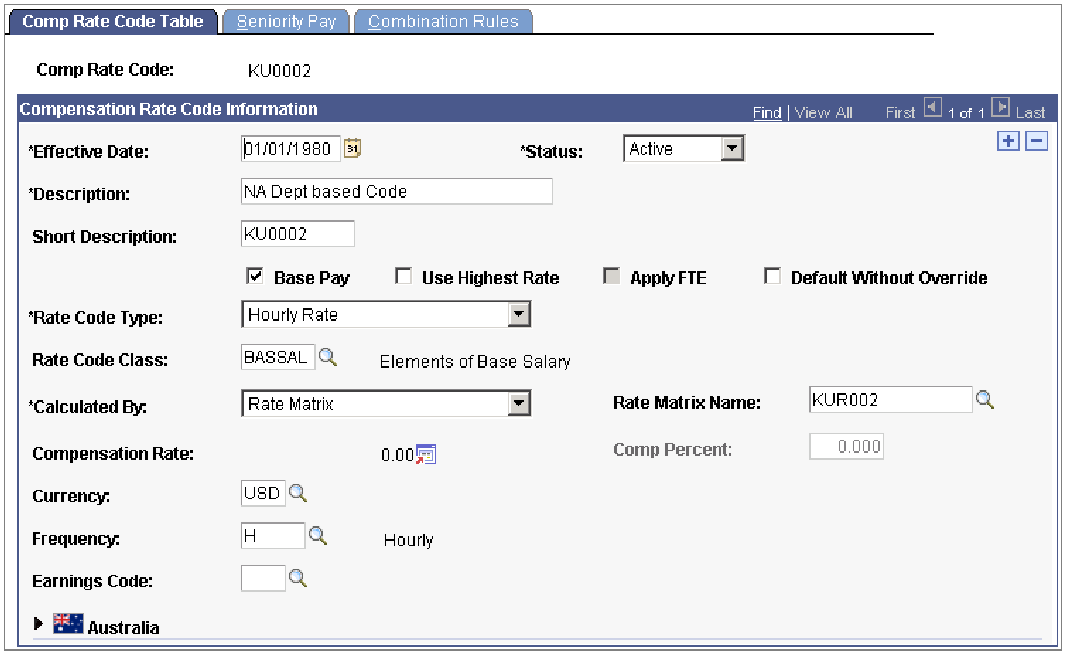
PeopleSoft provides a number of sample matrices that you can clone for you own use. Copy the:

- Structure only: This includes just matrix details, input and output definitions.
- Structure and keys: This includes the structure plus all search key values for every input.
- Structure, keys, and data: This clones the entire matrix.

Use Your Matrices to Manage Various Compensation-Related Functions

Use market pay matrices with specific job codes. It enables you to capture the compensation reference points and survey data for the job.

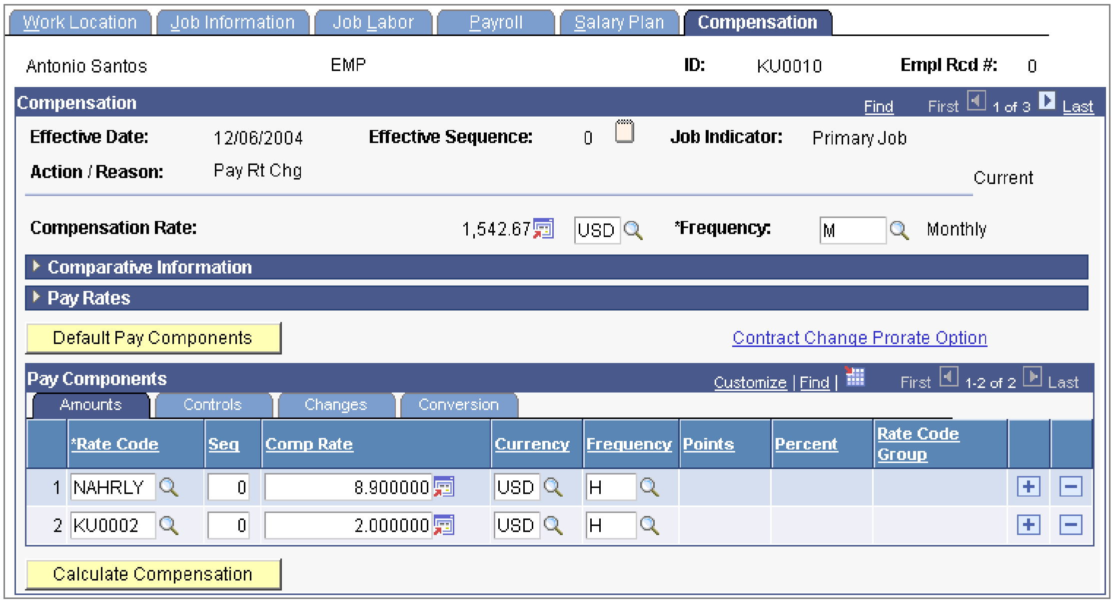
Use rate matrixes to store compensation rates based on a number of criteria. You can then associate a rate matrix to a rate code defined in the Comp Rate Code Table page. The rate matrix can return compensation rates that are directly listed in the matrix, or derived using formula-based result IDs.



Associate a matrix with a Comp Rate Code.

Use salary increase matrices to store salary increase guidelines, as percentages of base salary. These guidelines are usually based on the worker's performance ratings and ratios such as Compa-Ratio and Percent-In-Range. You can attach this matrix to specific rate codes on a group budget on the Create/Approve Group Budget – Budget Components page. The system applies the appropriate increases to workers when calculating the budget, based on the criteria in the matrix.

In this example, the system uses the matrix associated with the selected comp rate code and compares Antonio's department (the input search key values) against the matrix and determines the compensation rate (the data content of the output):



When you select a rate code with an associated matrix, the system calculates the compensation rate using the input and output parameters you defined for the matrix.

Market Pay

Identifying the competitive pay scale for a job or position is an important step in the overall compensation business process. In Human Resources, we support capturing the conclusion of your salary survey or market pay business processes as reference points to support other compensation business process.

In HRMS 8.9, we've taken advantage of the flexibility of the new configurable matrices feature to provide greater flexibility in the market pay data that can be stored in Human Resources.

Using the enhanced market pay functionality, you can:

- Defined and select the data points that you want to capture rather than restricting you to a limited, predefined set.
- Include geography as an attribute of market pay for different reference points based on the location of the worker.

  You can further distinguish geography by country, state, province, and city.
- Associate a market pay matrix with one or multiple job codes.

  The market pay matrix can be accessed through the Job Codes - Market Pay Match page or through the Associate Market Pay to Job Codes page.

- Upload data from the old Salary Survey tables into the new market pay tables using the Define Salary Survey Mapping page, taking advantage of information captured in previous releases.
- Upload data from PeopleSoft Enterprise Performance Management's Workforce Rewards, if you use this solution to support your salary survey or market pay analysis.

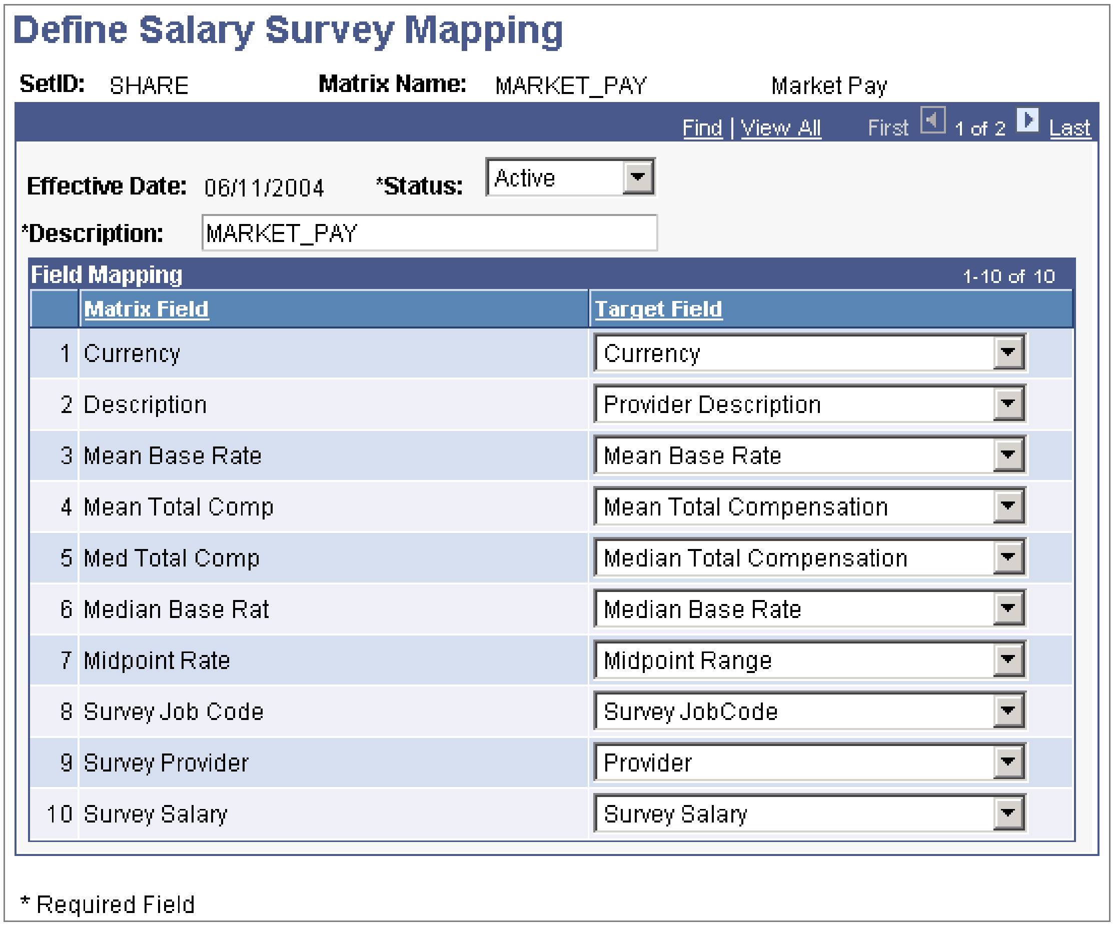
The flexibility of the enhanced solution enables you to define and select the data points that you want to capture rather than restricting you to a limited predefined set. For example, rather than just capturing the mean salary, you can now capture data for different reference points such as 25^{th}, 30^{th}, 50^{th} percentile base compensation along with bonus target percentages and target amounts.

Index Market Pay Data by Geographical Area

In addition, market pay data can also be indexed by geographical area. This can provide a refined view of market pay based on individual workers and groups in different geographical locations.

Map Salary Survey Data to the Market Pay Matrix

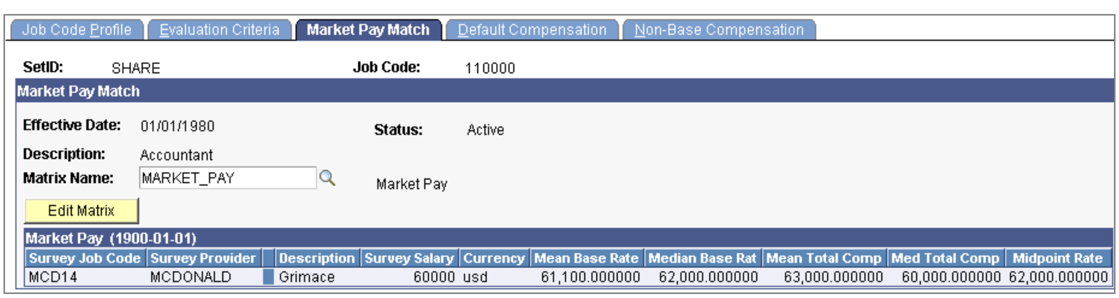
If you have been using the salary survey functionality from past releases, you can map the data to fields to be included in your market pay matrices.



Map the salary survey fields to the specific target fields to be included in the market pay matrix

Create a market pay matrix in the Define Matrices component.

After you have defined the market pay matrix, you can attach it to a job code using the Market Pay Match page.



Associating a market pay matrix to a specific job code.

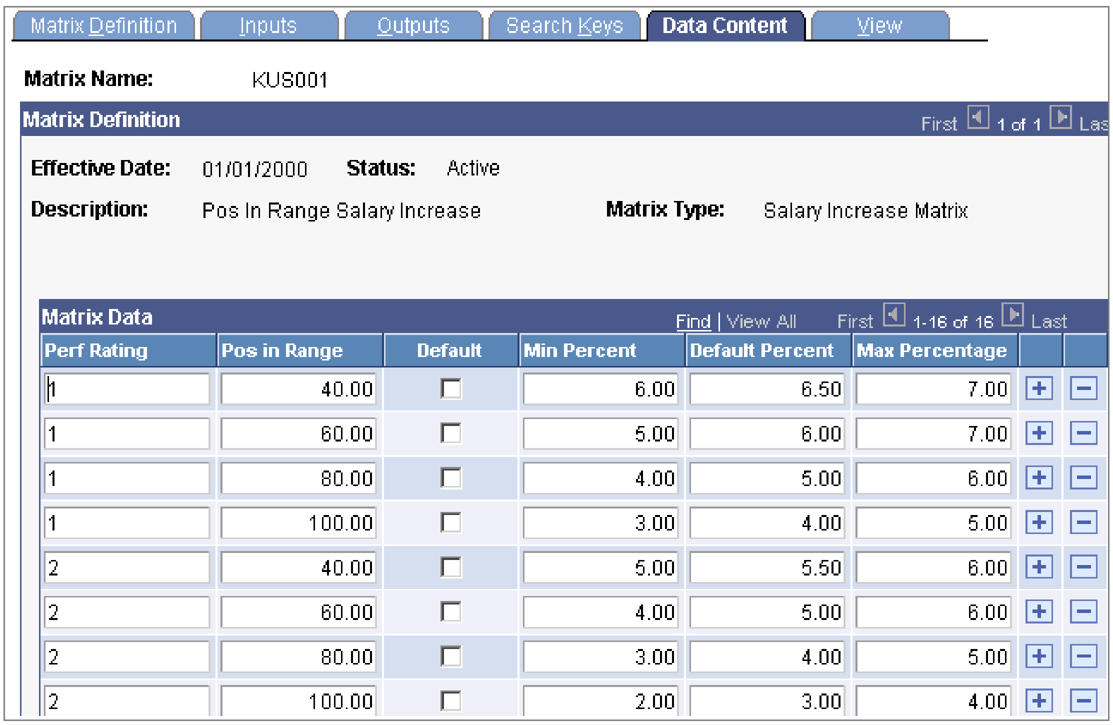
You can also import market pay data from PeopleSoft Workforce Rewards using application messaging.

Budget Enhancements

With HRMS 8.9, you can attach a Salary Increase Guidelines matrix to a budget. This allows the system to apply default recommended increases based on rules embedded in the matrix. There are also some usability enhancements including the loading of rate codes and better navigation. For each budget you can now define custom budget amounts, and also specify budget type. In addition, you can create user-defined budget fields for each budget type.

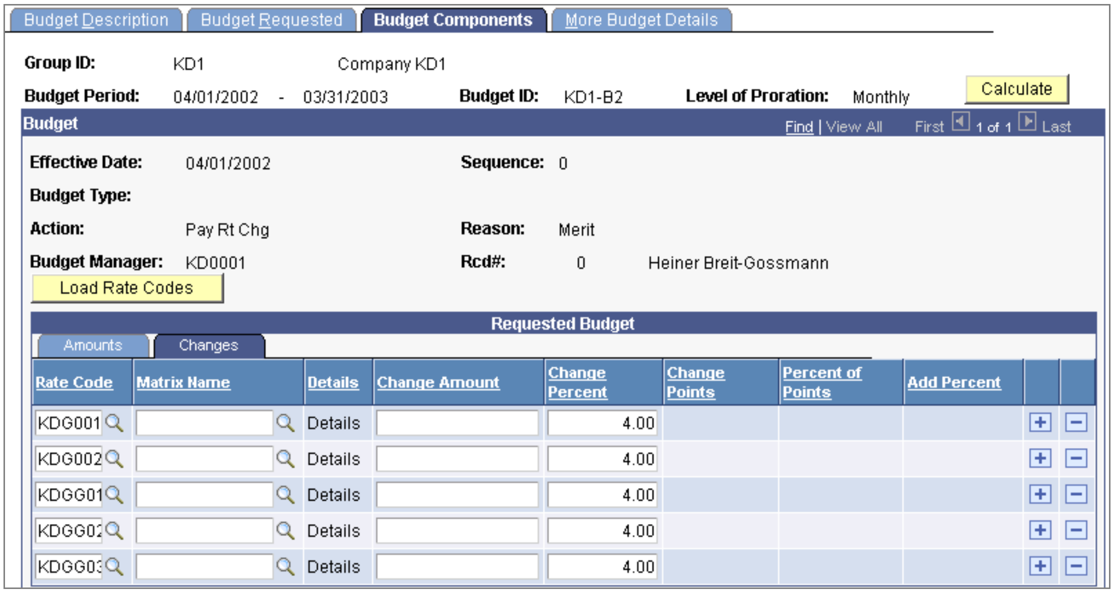
Establish a Salary Increase Guidelines Matrix Using a Configurable Matrix

After you have defined the inputs and outputs for the salary increase guidelines, enter or change the data content.



Entering or changing data content values for outputs (results) in a salary increase matrix that uses a configurable matrix.

Associate the New Salary Increase Guidelines Matrix to a Group Budget



Associating the salary increase matrix to a group budget

The Load Rate Codes button enhances usability by automatically populating grid with the rate codes assigned to the people in the group on the Job Data component.

What’s New in PeopleSoft Enterprise Payroll for North America 8.9?

Without an effective payroll system, a company can’t keep its employees productive and happy. It’s important for preparation, management, and reporting to be accurate and complete.

Payroll for North America is a mature, proven, feature-rich payroll solution. It accurately, efficiently manages payroll functions while ensuring compliance with federal, state, and local regulatory requirements.

HRMS 8.9 contains significant enhancements to Payroll for North America in ease of use and integration.

Ease of Use

Payroll for North America 8.9 includes features that make it easier for the payroll manager to manage and process payroll.

Alternative Overtime

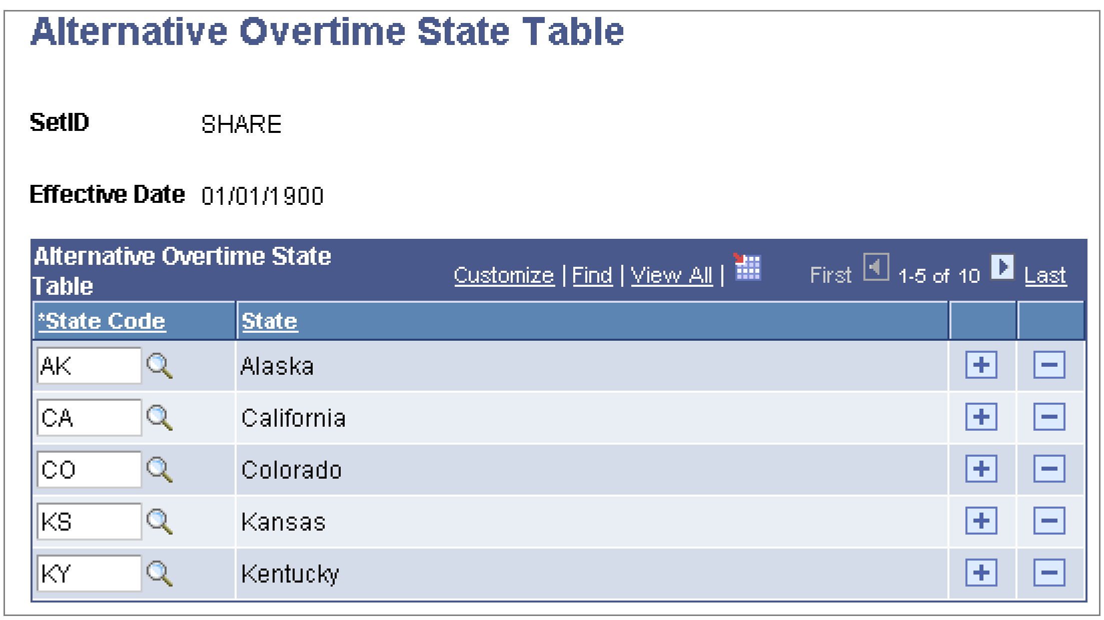
Recently enacted California legislation requires an employer to pay overtime at the rate of one and one-half times an employee’s regular rate of pay for hours worked over eight in a workday, and twice an employee’s regular rate of pay for hours worked over 12. Though we have supported FLSA calculations for many releases, California’s requirements go beyond this requirement. There are a number of other states that have similar requirements to the State of California such as Oregon.

Alternative overtime enables payroll managers to correctly calculate the rate of pay for employees affected by this legislation, without limiting the population to a specific state or locality. Additional flexibility allows any group of employees to be subject to the alternative method of overtime calculation.

This feature is useful for any organization that pays employees in California or other applicable states or requires the alternate calculation because of union or company agreements.

New alternative overtime functionality in Payroll for North America is designed to be flexible enough to handle most alternative overtime calculations. It includes the following:

- A new Alternative Overtime State table to identify the states in which alternative overtime calculations should apply.


Alternative Overtime State Table

SetID SHARE

Effective Date 01/01/1900

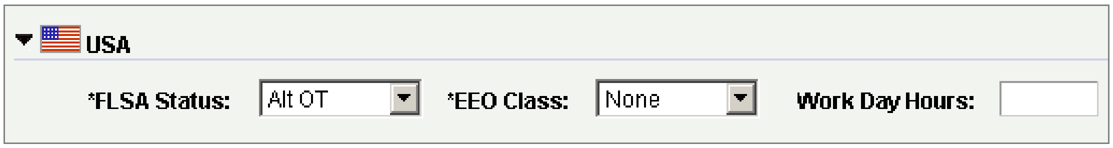
Alternative Overtime State Table — Customize | Find | View All | First 1-5 of 10 Last

*State Code	State
AK	Alaska
CA	California
CO	Colorado
KS	Kansas
KY	Kentucky

Alternative Overtime State Table page

PeopleSoft delivers this table with the states that have alternative overtime requirements. You can add additional states as necessary according to your company's alternative overtime business rules.

- Identification of workers who are subject to alternative overtime calculations by using a new value for the FLSA Status field in the worker's job data.



FLSA Status field on the Job Data – Job Information page

- For those employees identified, the system calculates overtime on the alternative basis rather than the usual FLSA method.

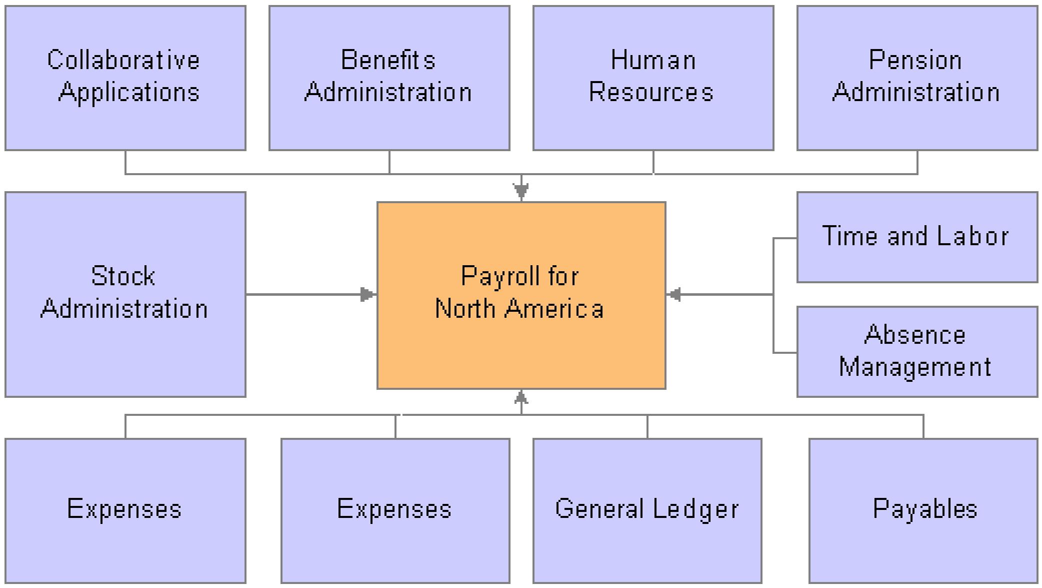
  To calculate alternative overtime, the system uses the multiplication factor specified for the overtime earnings code on the Earnings table instead of the fixed 0.5 used in federal FLSA calculation.

- When the overtime has been calculated by the alternative method, the rate is displayed with the label *Alternative Rate* rather than *FLSA Rate*.

Integration

Payroll systems are never standalone. There is always a need for systems to supply data to the payroll process or receive payroll results. In Payroll for North America 8.9, we deliver features that improve integration with the payroll system.

This diagram illustrates the applications with which Payroll for North America integrates, both within PeopleSoft Enterprise HRMS and with PeopleSoft Enterprise Financials:



Payroll for North America integrations

Sales Incentive Management Integration

Companies want an automated process that enables them to distribute incentive payouts to their employees by transmitting PeopleSoft Enterprise Sales Incentive Management data to Payroll for North America for the next scheduled pay run. Today, users must either create a custom interface or manually enter the data. These two processes are costly and time consuming and may result in delayed payouts.

To facilitate incentive payments in Payroll for North America 8.9, we introduce a bi-directional data interface between Sales Incentive Management and Payroll for North America. This interface includes functionality to configure the data integration and then manage the ongoing exchange, payment, and confirmation of the gross payment data. This capability decreases the time needed to compensate the sales force and ensure greater data reliability and accuracy.

The integration uses Integration Broker messaging. Here is a summary of the business process:

1. Sales Incentive Management publishes a payment request message to Payroll for North America.

2. Payroll for North America receives the approved Incentive Payout Amounts and/or adjustments, validates them, and posts a message on PS Application Message Monitor to inform you that the records have arrived. Records that do not pass the validation for any of the following reasons are returned to the Sales Incentive Management automatically so they can be corrected and resent:
   - Invalid Earnings Code.
   - Invalid Employee ID & Record #.
   - Invalid Currency Code.
   - Transaction already exists.
   - Amount Exceeds Payroll Maximum.
   - Negative amount.
3. The payroll office loads valid transactions to paysheets using the Load Paysheets PSJob process (PYLOAD).
4. After a payroll is processed and confirmed, payroll publishes a payment notification message to the Sales Incentive Management application.

The Sales Incentive Management Notification process (PYEIM_NOTIFY) publishes the following information to PeopleSoft Enterprise Human Resources when awards have been paid:

- SIM Sequence Number.
- Employee ID.
- Employee record number.
- Earnings code.
- Incentive amount.
- Currency code.
- Earnings begin date.
- Earnings end date.
- Department ID.
- SIM payout date.
- Separate check indicator.
- Gross-up indicator (If gross-up is requested, the paysheet update process will automatically set the separate check flag to ‘Y’.).
- Check date.
- Check or advice number.

- Check type.
- Paycheck reprint.

Absence Management Integration

Integration with PeopleSoft Enterprise Absence Management and Payroll for North America 8.9 is accomplished through table sharing. The integration can occur either directly or through PeopleSoft Enterprise Time and Labor. Absence Management delivers the ability to export computed absence results to enable direct integration between Absence Management and Payroll for North America.

The interface begins when the absence conversion process is run and makes the absence results available to Payroll for North America. After this process is completed, the Absence Management data resides in the Paysheet Load Holding Record (PSHUP_TXN) in Payroll for North America.

The Payroll for North America administrator can then load paysheet transactions by selecting *Absence Management* in the Paysheet Update Source field in the Calculate Options group box on the Load Paysheet Transactions page in Payroll for North America.

Paysheets containing absence management payout are calculated and confirmed via the normal payroll process.

Time and Labor Processes

If your organization uses Time and Labor in conjunction with Payroll for North America, Absence Management exports computed absence results to Time and Labor. Time and Labor converts this information into payable time and adds sequence and reference numbers for eventual cost distribution.

When payees are enrolled in Time and Labor, the system creates Time and Labor Reported Time when you run the Absence Conversion process, instead of creating PSHUP data, as is the case for employees who are not enrolled in Time and Labor.

The Time Administration process uses the Time and Labor reported time to generate payable time, which the payroll administration can load to paysheets to complete the Paysheet process.

Student Financials Integration

Student Financials provides the ability to refund credit balances to students, customers, or external organizations. You can choose to refund credit account balances using Accounts Payable, Payroll for North America, or electronically via eCheck and Credit Card processing.

The interface between Student Financials and Payroll for North America 8.9 enables you to refund desired amounts to students in the form of physical checks or direct deposit and process those refunds in both batch and online (real-time) modes.

The interface begins when refund requests are validated and processed in Student Financials. The refund data is then made available to Payroll for North America and resides in the Paysheet Load Holding Record (PSHUP_TXN) in Payroll for North America.

The Payroll for North America administrator can then load paysheet transactions by selecting *Other Sources* in the Paysheet Update Source field in the Calculate Options group box on the Load Paysheet Transactions page in Payroll for North America.

The paysheets are then calculated and confirmed via the normal payroll process. The refund is updated with check information (following confirmation process) either online or via the new batch confirmation process.

Standard ChartField Configuration

Payroll expenses represent one of the largest operating costs within an organization. Companies are constantly seeking ways to more accurately and efficiently post payroll information to the general ledger.

New with PeopleSoft Enterprise 8.9, the standard ChartField configuration enables consistent use of ChartFields between General Ledger and Payroll for North America. It allows for the synchronization of ChartField configuration between the two PeopleSoft applications, thereby providing the information necessary for more detailed reporting of labor costs.

Identification of General Ledger System on the Installation Table

The Installation table provides new fields for identifying whether the general ledger system is PeopleSoft Enterprise Financials GL or another system. For customers with PeopleSoft Enterprise Financials GL, additional fields identify the release number and enable additional configuration options. Some pages that have been display-only pages are now editable when the Installation table indicates that the customer is using a GL product other than PeopleSoft Enterprise General Ledger.

ChartField Integration Points

All ChartFields that can be used on the standard ChartField configuration are now subscribed to individually from the Financials database and are available for both commitment accounting and noncommitment accounting. The supported ChartFields are:

- GL Account
- Alternate Account
- Fund
- Operating Unit
- Department
- Program Code
- Class Field

- Budget Reference
- Product
- Project
- User ChartField 1
- User ChartField 2
- User ChartField 3
- Fund Intraunit
- Affiliate (Business Intraunit)
- Operating Unit Intraunit

Standard ChartField Configuration Template

The standard ChartField configuration that is defined in the Financials database is subscribed to and available for viewing in HRMS.

The Standard ChartField Configuration page enables viewing of the following standard ChartField configuration details as set up on the template in the Financials database:

- Active or inactive status.
- The ChartField label.
- The display length.
- Affiliate type (intraunit or interunit).
- Intra unit related ChartField.

An Application Engine process enables you to view the impact of subscribed changes in the configuration prior to applying those changes in the HRMS database.

For customers who use a general ledger system other than PeopleSoft Enterprise General Ledger, the fields on the Standard ChartField Configuration page are editable.

Inquiring on ChartField Values

We now provide a single introductory page from which you can access a separate inquiry page for each of the active ChartFields to view ChartField values. The introductory page lists the ChartFields with the dynamic labels assigned on the standard ChartField configuration template in Financials. For customers who use a general ledger system other than PeopleSoft Enterprise General Ledger, the page display reflects the customer’s configuration on the Standard ChartField Configuration page.

Consistent Display of Dynamic ChartFields

Dynamic ChartFields are displayed consistently throughout HRMS with the exception of Global Payroll products. The ChartField display is consistent with the display format in PeopleSoft Enterprise Financials. The display is either in a vertical or horizontal format, depending upon the amount of space on the page. In some cases, the ChartFields are displayed on an auxiliary page that is accessed by a ChartField Detail link on the primary page.

Combination Codes and Combination Code Editing

A particular set of ChartField values forms a combination code. ChartField Combinations defined in the Financials database (both active and inactive) are stored on the new Combination Code table. The Account Code Load process (BUD003) now loads this table rather than the Account Code table. When a user keys in a ChartField combination, the system validates the combination against this table or through a new integration point provided.

For customers with any GL system, the combinations that have been used in Payroll for North America for either commitment accounting or noncommitment accounting are stored in the Chartfield Transaction table. Using this stored information, the system enables quick entry of combination codes through a lookup prompt.

New Functionality for Commitment Accounting

In addition to the common General Ledger enhancements already described, the following new functionality is added for commitment accounting:

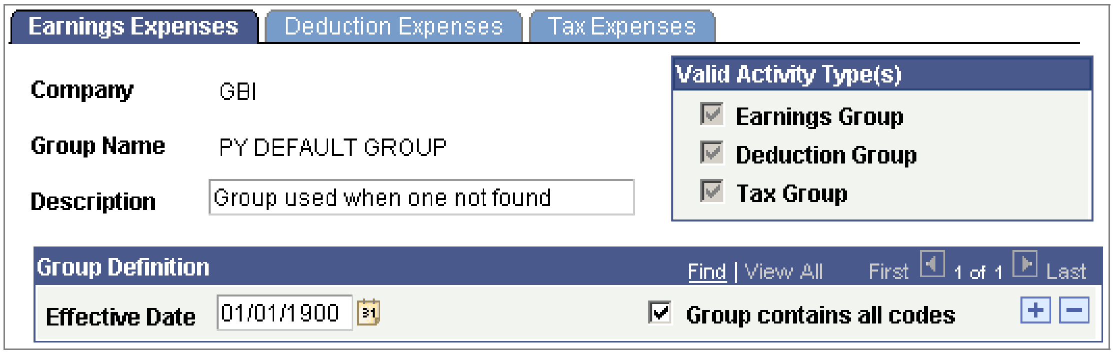
- A new Budget Period Calendars page to view the budget period data published by the Financials database.
- Two new ChartFields—Fund Affiliate and Operating Unit Affiliate—are added to the PAYGL02 and PAYGL03 processes, the Payroll Accounting Transaction message, the AP Extract processing, and BUD014 processing.

Grouping of Expense Activities for Noncommitment Accounting

Now organizations that use noncommitment accounting can track expenses by creating an activity definition that groups logical expenses together for one definition rather than defining the GL account on individual earning, deduction, and tax activities.

Organizations can group expense activities into logical definitions that share a common ChartField combination, such as all regular earnings in one group and all overtime earnings in another group. Liability accounts remain on the source tables, such as the Deduction table, because traditionally a liability is used to pay a vendor and the GL account represents the vendor.

The Earnings Expenses, Deduction Expenses, and Tax Expenses pages are used to define logical groups for ChartField mapping.



Earnings Expenses page

The expense code fields have been removed from the individual pages on which expense accounts were formerly assigned.

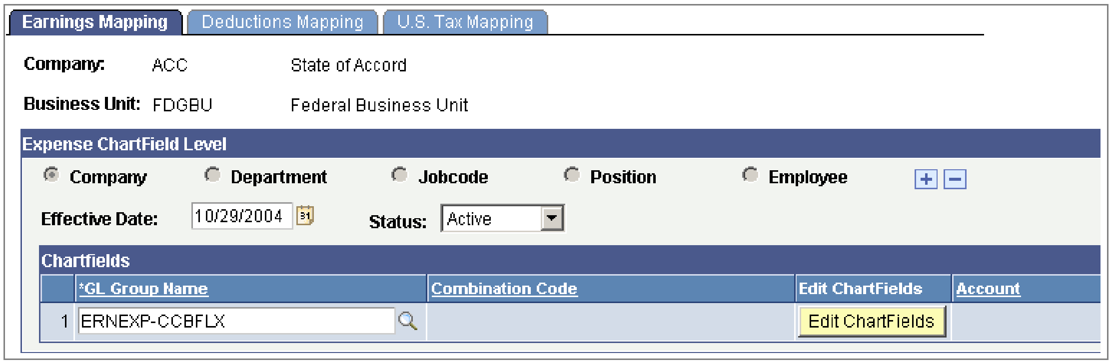
ChartField Mapping for Noncommitment Accounting

In defining ChartField mappings for expense activities, you can assign ChartFields based on levels:

- Company
- Department
- Job code
- Position
- Employee ID/employment record (specific job)

When resolving the mapping for a payroll record, the GL Interface PSJob process (PAYGL01) starts at the lowest level—employee—and determines whether there is a definition for the employee and activity group being processed. If it is not found, the search goes one level up, to the job code being processed, and continues up the tree until a mapping for the current payroll record is found. The search stops when an entry is found. This way you need to define mapping entries only at lower levels where desired. For example, earnings could be assigned at the employee level while the employer expenses for taxes remain at the company level.

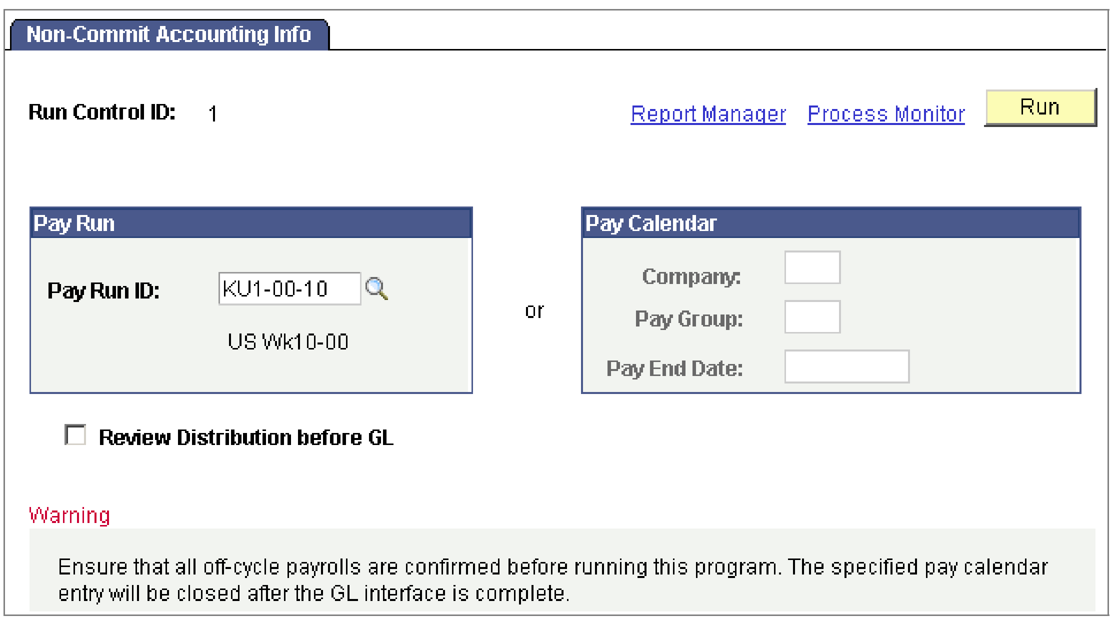
The Earnings Mapping, Deduction Mapping, U.S. Tax Mapping, and Canadian Tax Mapping pages are used to define the ChartField defaulting level and assign GL groups to ChartField values.



Earnings Mapping page

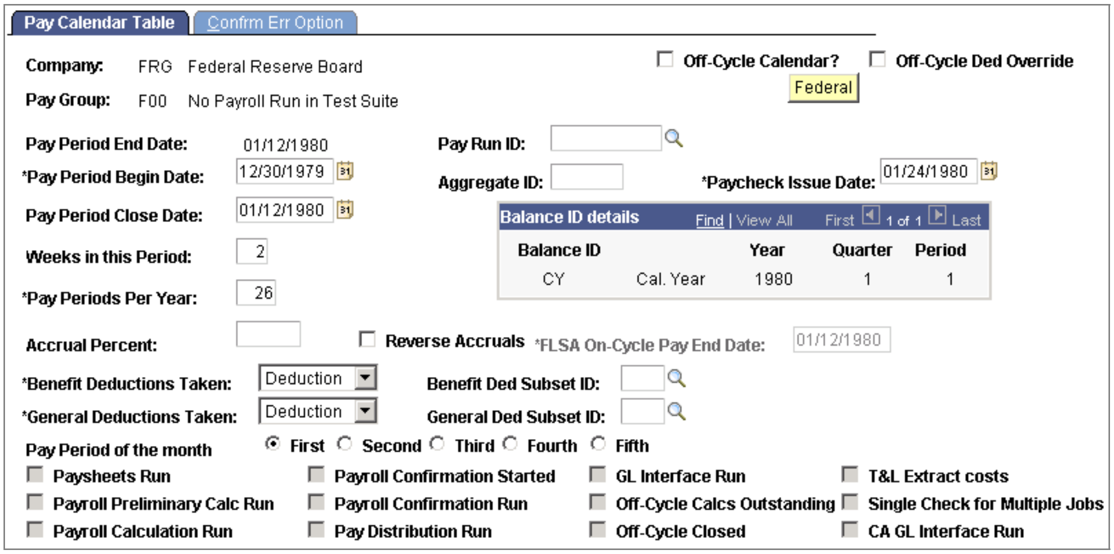
Distribution to GL for Noncommitment Accounting

There is a new run control parameter for the GL Interface process that enables the system to run just the distribution process and display the results on inquiry pages without actually posting the accounting lines to the HR Accounting Lines table. This way, you can make corrections and rerun the distribution as necessary before creating the accounting lines.



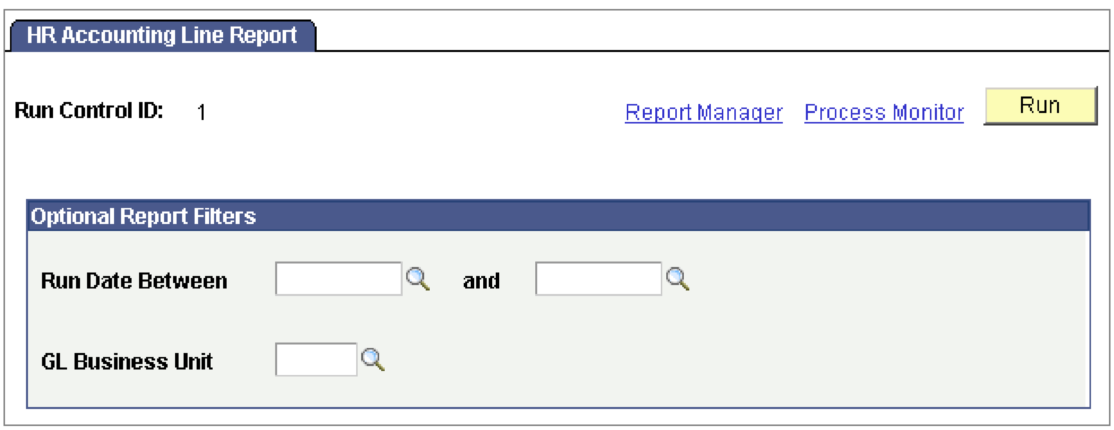
Non-Commit Accounting Info page

Indicators on the Pay Calendar Table page show whether the distribution has been run (Payroll Distribution Run) and whether the accounting lines have been created (GL Interface Run):



Pay Calendar Table page

The HR Accounting Lines report (PAY039) can now be run for a specified date range and GL business unit:



HR Accounting Line Report page

What's New in PeopleSoft Enterprise Time and Labor 8.9?

Companies today require a time and attendance application that addresses industry-specific and global time and attendance needs. To enable greater efficiency, it must act as a single repository of time that processes all rule requirements while integrating to HRMS, financial, manufacturing, and distribution systems.

Time and Labor is a flexible, integrated solution that gives organizations the intelligence and power in a single repository to determine key performance indicators that are impacted by time-related data. It is designed to support the time-related needs of a wide range of business functions—including payroll, financial and cost accounting, project management, employee benefits, and organizational administration—across industries.

Time and Labor enables organizations to:

- Reduce their gross payroll costs by automating time capture and complex pay rate calculations.
- Improve employee productivity by streamlining time-consuming processes.
- Reduce infrastructure costs by consolidating disparate legacy and homegrown systems.
- Support better decision making with enterprise analysis of labor data.
- Make sure that the right worker is in the right job at the right time.
- Increase customer satisfaction as cost effectively as possible.

In Time and Labor 8.9, there are significant enhancements in the following areas:

- Scheduling.
- Time reporting.
- Business process controls.
- Financials integration.
- Performance.

Scheduling

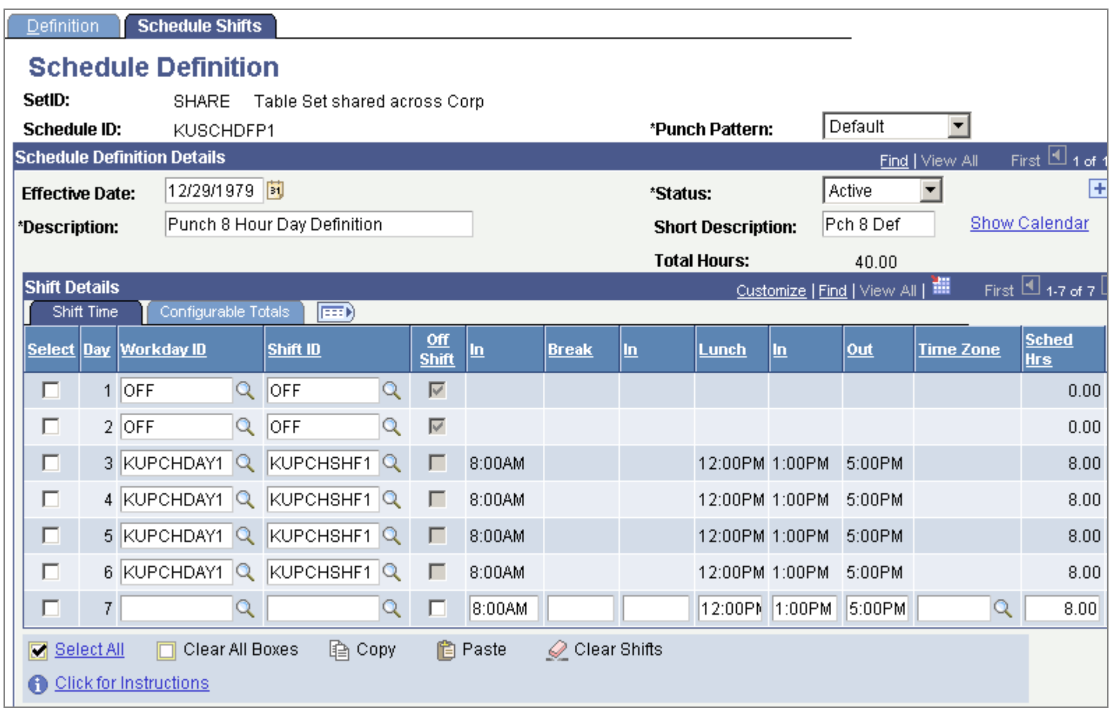
There are three scheduling environments that an organization is likely to encounter. In a fixed schedule environment, employees are assigned a work pattern on hire or on a change in role or situation. The planned work pattern is static and is changed only in special situations. In a rotating schedule environment, schedule rosters are established in advance and assigned to groups of employees on hire or when a new project or period begins. In a dynamic environment, an employee does not have a set schedule; a new schedule is established every period, and updates are made frequently based on a variety of factors.

In each environment, it is critical for schedules to be created and maintained systematically to communicate work expectations, track adherence, and reconcile with actual work completed. Time and Labor 8.9 provides improved capabilities to support each schedule environment.

Fixed Schedule Environments

In Time and Labor 8.9, a company may support centralized standard schedule definitions and ad hoc manager-specified work patterns. All schedule building blocks, including shifts, workdays, and schedule definitions, are optional. For example, an organization may want to establish only standard shifts and allow these to be assigned directly to employees.

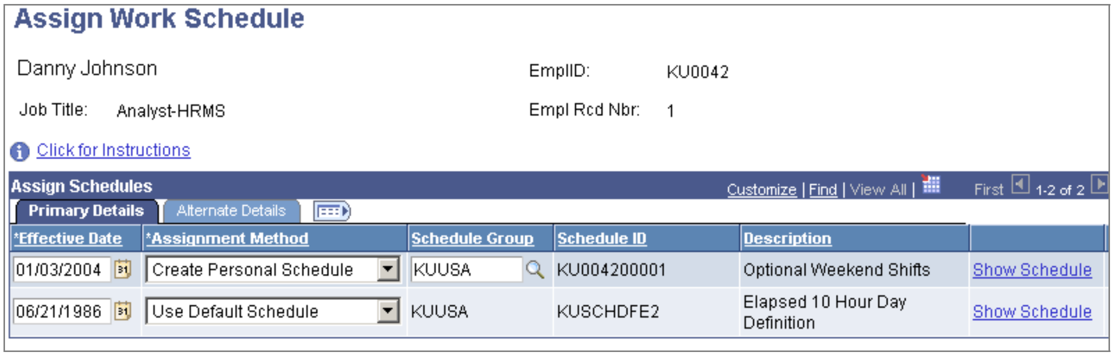
Following is a schedule definition consisting of two Off days, and five punch days of eight hours each.



Schedule Definition – Schedule Shifts page

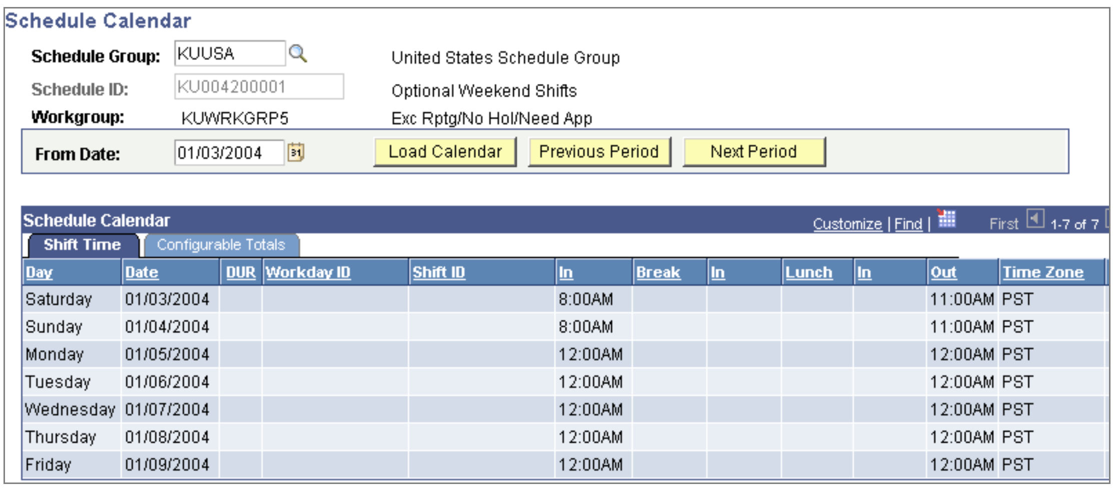
The Workday ID and Shift ID are optional. As shown in the last row, a schedule can be defined by directly specifying the information on the schedule definition.

The Schedule Definition component is also optional. The following is an example of a schedule created on an ad hoc basis for a time reporter:



Assign Work Schedule page

Selecting the Assignment Method of ***Create Personal Schedule*** displays a page where the ad hoc schedule can be defined.

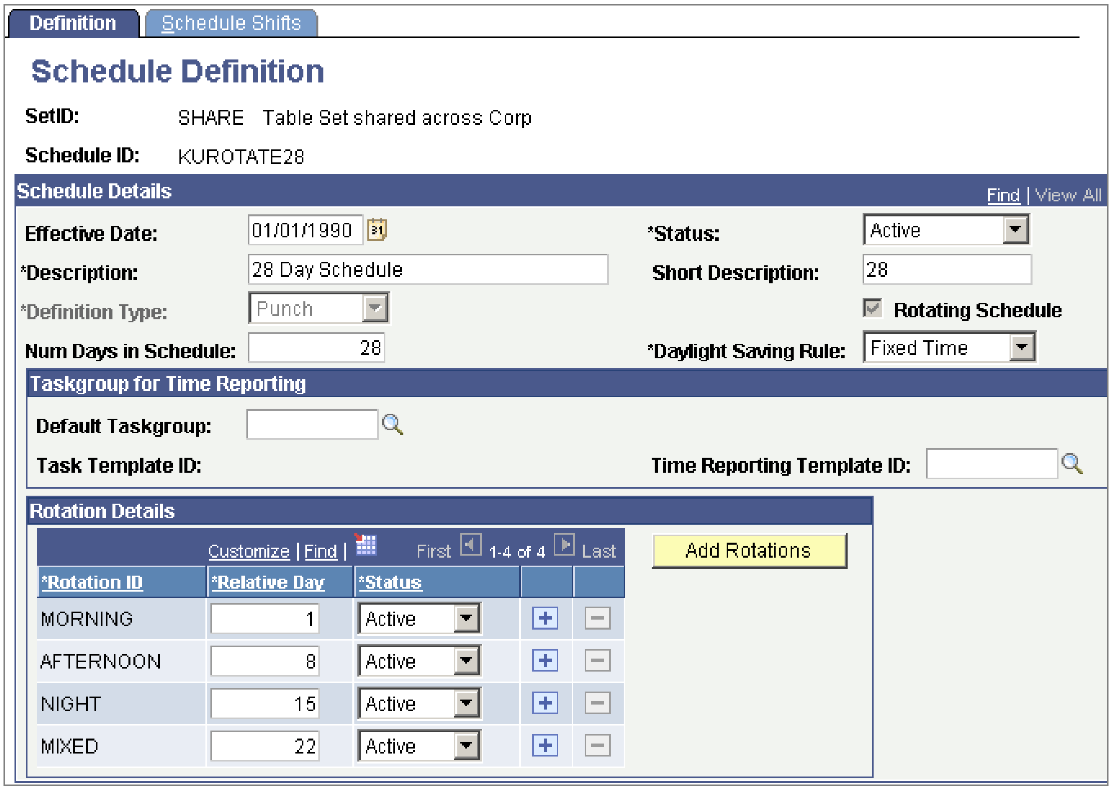


Show Schedule link

Rotating Schedule Environments

In Time and Labor 8.9, a set of rotations, with relative start days, may be defined on a schedule. For example, Crew A may start its rotation on day one of the pattern and Crew B may start on day seven. Schedule patterns are not associated with specific dates until an employee is assigned to the pattern, allowing for maximum flexibility and reusability. The scheduler may choose a sample date, however, and view the resulting rotation pattern.

The following shows a Schedule Definition including a rotating shift pattern:



Schedule Definition page

Time and Labor 8.9 also accommodates split shifts on one day, and off shifts that are greater or less than 24 hours. These features are particularly useful for organizations that operate on a 24-hour schedule and must rotate individuals between day shifts and night shifts.

Dynamic Schedule Environments

Dynamic scheduling environments require frequent schedule changes and intelligent scheduling arrangements. Today, the schedule override capabilities are intended for infrequent ad hoc use.

In Time and Labor 8.9, a generic interface to the open scheduling architecture loads optimized work schedules or data from other systems, including training data from Learning Management. Managers have a graphical interface to view schedules for their employees, as shown below:

Employees For Betty Locherty

Select	Name	Job Title	Saturday 01/04/03	Sunday 01/05/03	Monday 01/06/03	Tuesday 01/07/03	Wednesday 01/08/03	Thursday 01/09/03	Friday 01/10/03
☐	Antonio Santos	Assistant-Administrative	0 Hours OFF	0 Hours OFF	8 Hours KUPCHSHF1 8:00 AM-5:00 PM	8 Hours KUPCHSHF1 8:00 AM-5:00 PM	8 Hours KUPCHSHF1 8:00 AM-5:00 PM	8 Hours KUPCHSHF1 8:00 AM-5:00 PM	8 Hours KUPCHSHF1 8:00 AM-5:00 PM
☐	Beatrice Test	Analyst-Financial	0 Hours OFF	0 Hours OFF	8 Hours K08HRS 8:00 AM-5:00 PM	8 Hours K08HRS 8:00 AM-5:00 PM	8 Hours K08HRS 8:00 AM-5:00 PM	8 Hours K08HRS 8:00 AM-5:00 PM	8 Hours K08HRS 8:00 AM-5:00 PM
☐	Carmichael Espinosa	Consultant-Senior	0 Hours OFF	0 Hours OFF	10 Hours KUELPSHF2	10 Hours KUELPSHF2	10 Hours KUELPSHF2	10 Hours KUELPSHF2	0 Hours OFF
☐	Charles Baran	Vice President-Operations	0 Hours OFF	0 Hours OFF	8 Hours KUELPSHF1	8 Hours KUELPSHF1	8 Hours KUELPSHF1	8 Hours KUELPSHF1	8 Hours KUELPSHF1

Manage Schedules page (1 of 2)

☐	Darlene Bergsten	Analyst-Business	0 Hours OFF	0 Hours OFF	8 Hours K08HRS 8:00 AM-5:00 PM	8 Hours K08HRS 8:00 AM-5:00 PM	8 Hours K08HRS 8:00 AM-5:00 PM	8 Hours K08HRS 8:00 AM-5:00 PM	8 Hours K08HRS 8:00 AM-5:00 PM
☐	David Martignoni	Consultant-Senior	0 Hours OFF	0 Hours OFF	8 Hours KUELPSHF1	8 Hours KUELPSHF1	8 Hours KUELPSHF1	8 Hours KUELPSHF1	8 Hours KUELPSHF1

Schedule Actions

Schedule Replacements | Copy Schedules | Swap Schedules

Legend

Approved Training	Planned Absence	Holiday	Multiple Shifts
Crossover Shift ⇨	Scheduled OFF Day **OFF**	Replaced Employee **R**	

Manage Schedules page (2 of 2)

In addition to viewing coverage, assigned shifts, and total work hours, managers can identify individuals with planned absences or training. If updates need to be made to the schedule, managers can find replacements, swap shifts, copy schedules, and make short- and long-term schedule changes.

General Scheduling Enhancements: Employee Access

In addition to these enhancements, Time and Labor 8.9 allows employees to view their monthly schedule, including work and shift information, planned absences, holidays, and training. The following shows a time reporter's monthly schedule, including a holiday (denoted by the suitcase icon) on the 25th and 26th:

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 KUELPSHF1 8 Hours	2 KUELPSHF1 8 Hours	3 KUELPSHF1 8 Hours	4 KUELPSHF1 8 Hours	5 KUELPSHF1 8 Hours	6 OFF
7 OFF	8 KUELPSHF1 8 Hours	9 KUELPSHF1 8 Hours	10 KUELPSHF1 8 Hours	11 KUELPSHF1 8 Hours	12 KUELPSHF1 8 Hours	13 OFF
14 OFF	15 KUELPSHF1 8 Hours	16 KUELPSHF1 8 Hours	17 KUELPSHF1 8 Hours	18 KUELPSHF1 8 Hours	19 KUELPSHF1 8 Hours	20 OFF
21 OFF	22 KUELPSHF1 8 Hours	23 KUELPSHF1 8 Hours	24 KUELPSHF1 8 Hours	25 KUELPSHF1 8 Hours	26 KUELPSHF1 8 Hours	27 OFF
28 OFF	29 KUELPSHF1 8 Hours	30 KUELPSHF1 8 Hours				

Monthly Schedule page

Time Reporting

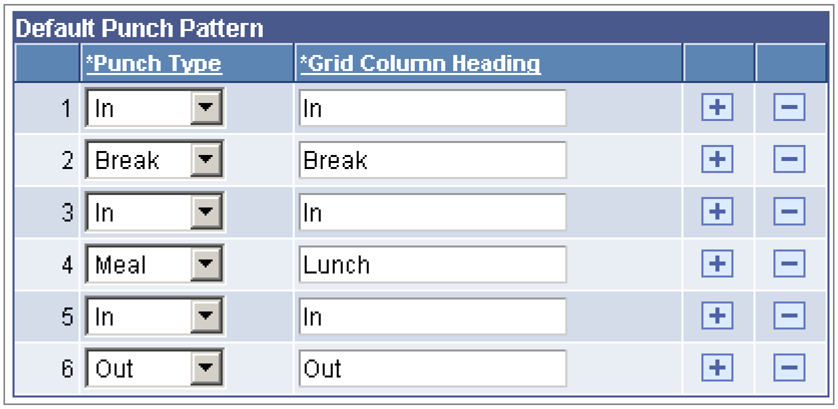
Time reporting requirements differ from industry to industry and organization to organization, but one thing remains the same: time reporting must be fast and easy. Companies need self-service timesheets to be flexible enough to support all different types of employee populations but easy enough to ensure that employees can perform this administrative task quickly and accurately.

Time and Labor 8.9 includes a new and improved self-service timesheet that features prepopulation and configurability, visibility to useful information, and task completion usability improvements.

Prepopulation and Configurability

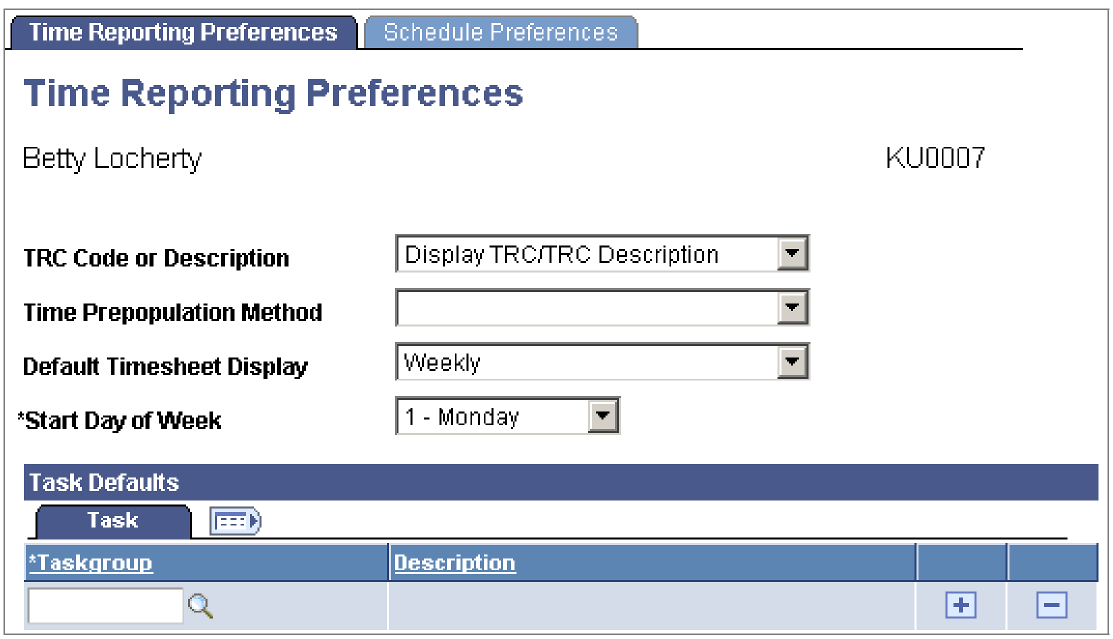
Each employee population may have different needs for cost reporting, data prepopulation, and time recording.

For punch-time reporting, a configurable, predefined punch pattern (such as In, Meal, In and Out) prepopulates the timesheet horizontally. Time reporters or adjusters do not need to enter a punch type. They can simply enter the punch time and any supporting attributes to complete time entry. The following shows the default punch pattern configuration:



Default Punch Pattern configuration

According to the configuration, timesheets can be prepopulated with scheduled time, the previous period's time, or with the default task information from the specified taskgroup. The following shows the User Preferences component, where default timesheet configurations are set:



User Preferences – Time Reporting Preferences page

Time can be viewed or reported by day, week, or time period. When viewing or reporting time-by-time period, the timesheet prepopulates with the number of days defined by the time period assigned to the employee.

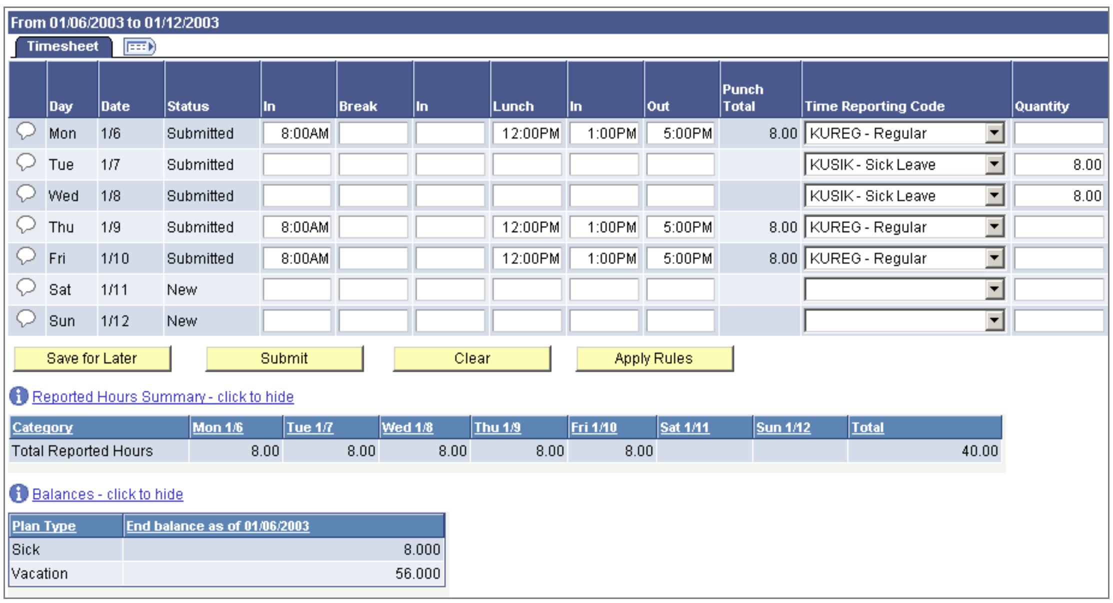
When viewing time by week, the start day of the week can be configured to display according to the employee's workweek. If the employee's workweek typically starts on a Wednesday, the timesheet can be configured to display the week beginning with that day.

Visibility to Useful Information

Information such as total hours reported, total scheduled hours, and available leave balances help employees and managers to ensure accurate time reporting and corrections.

Employees and managers have easy access to leave balance and schedule information from within the timesheet. Users can view daily and period running totals by time categories (customer-configured groupings of time reporting codes). For example, an organization may want to group time as productive and nonproductive, providing decision support information with data elements that are truly useful to each organization.

The following shows a timesheet with the summary and balance information visible:



From 01/06/2003 to 01/12/2003

Timesheet

Day	Date	Status	In	Break	In	Lunch	In	Out	Punch Total	Time Reporting Code	Quantity
Mon	1/6	Submitted	8:00AM			12:00PM	1:00PM	5:00PM	8.00	KUREG - Regular	
Tue	1/7	Submitted								KUSIK - Sick Leave	8.00
Wed	1/8	Submitted								KUSIK - Sick Leave	8.00
Thu	1/9	Submitted	8:00AM			12:00PM	1:00PM	5:00PM	8.00	KUREG - Regular	
Fri	1/10	Submitted	8:00AM			12:00PM	1:00PM	5:00PM	8.00	KUREG - Regular	
Sat	1/11	New									
Sun	1/12	New									

Save for Later | Submit | Clear | Apply Rules

Reported Hours Summary - click to hide

Category	Mon 1/6	Tue 1/7	Wed 1/8	Thu 1/9	Fri 1/10	Sat 1/11	Sun 1/12	Total
Total Reported Hours	8.00	8.00	8.00	8.00	8.00			40.00

Balances - click to hide

Plan Type	End balance as of 01/06/2003
Sick	8.000
Vacation	56.000

Timesheet page

Task Completion Improvements

In Time and Labor 8.9, enhancements have been made to speed time reporting:

- Punch-time reporters and adjusters have a single page to report punch and elapsed time.
- Users automatically access the timesheet based on today's date. The timesheet is configured to display according to how the user would most likely enter their time-by day, week, or time period. If entering time by week, the timesheet will display according to the start day of week specified on the user preferences page.

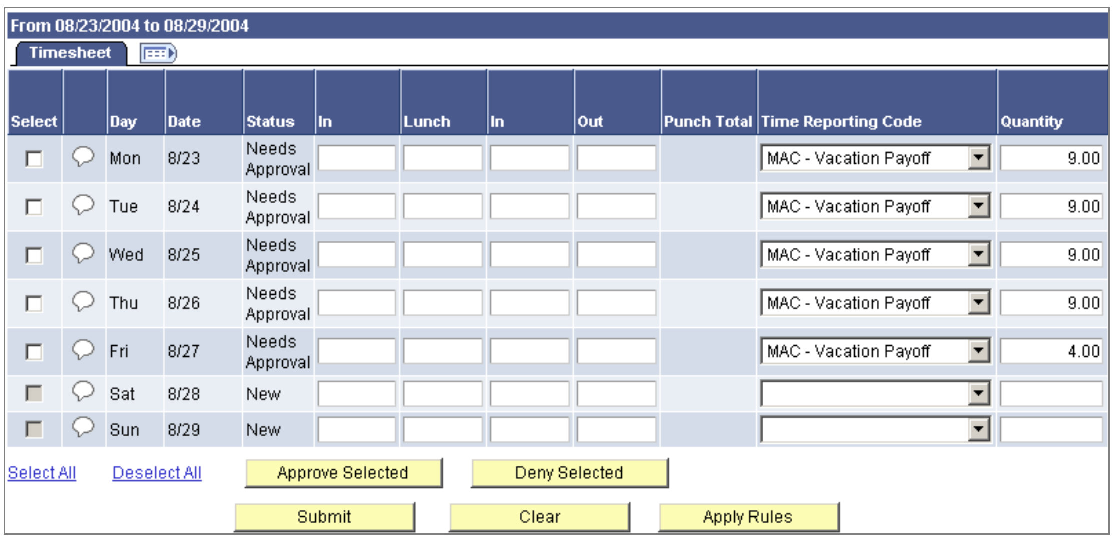
- Time reporting codes are filtered so that only the codes that should be entered online are available.
- Managers can scroll through employees by using next in list and previous in list functions, thereby reducing the number of clicks required to complete the job.

Business Process Controls

It is critical to report hours and costs accurately, control costs, and track reviews and adjustments carefully.

Timesheet Approvals and Controls

In many organizations, a manager must approve time immediately after submittal. It is essential that the manager sign off on the hours that are recorded by the employee, as well as task elements that were charged (such as project and activity). In Time and Labor 8.9, organizations have the ability to immediately approve the time once the employee reports it. The following shows the approval options on the timesheet:


From 08/23/2004 to 08/29/2004

Timesheet

Select		Day	Date	Status	In	Lunch	In	Out	Punch Total	Time Reporting Code	Quantity
		Mon	8/23	Needs Approval						MAC - Vacation Payoff	9.00
		Tue	8/24	Needs Approval						MAC - Vacation Payoff	9.00
		Wed	8/25	Needs Approval						MAC - Vacation Payoff	9.00
		Thu	8/26	Needs Approval						MAC - Vacation Payoff	9.00
		Fri	8/27	Needs Approval						MAC - Vacation Payoff	4.00
		Sat	8/28	New							
		Sun	8/29	New							

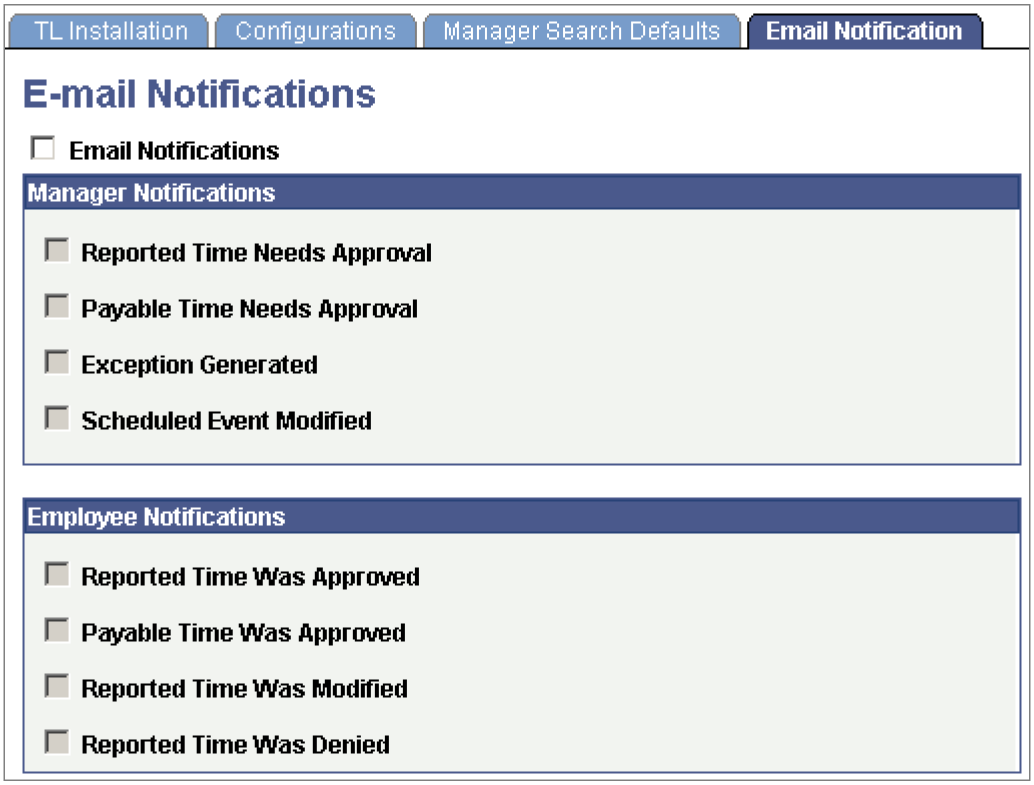
Select All Deselect All Approve Selected Deny Selected

Submit Clear Apply Rules

Timesheet page

In Time and Labor 8.9, organizations can use email notifications to notify managers when time needs approving. Managers can submit, approve, deny, or adjust reported time at the timesheet level. Employees are notified when their reported time has been approved, denied, or if an adjustment has been made to the time. Managers are notified when their employee’s time needs approval, or when an exception is generated for some time that was reported.

The following shows the notifications that may be configured:



TL Installation – Email Notification page

Managers can view timesheets for all their employees, including those who have not yet submitted time and those who have exceptions that are associated with their time, in one central location.

If configured, statuses control the flow and security of data—preventing unsubmitted or unapproved data from being processed.

For organizations that need additional controls and audit capabilities, comments may be recorded at the day level to capture such information as overtime explanations or adjustment reasons. As an additional control feature, future period entry may be controlled at the role level, similar to how prior period entry is controlled.

These features are useful to many customers, but may be particularly useful to those who are concerned about DCAA compliance.

Payable Time Approval Enhancements

Many organizations need to review processed time before it is paid to ensure accurate payment. You can complete this task quickly and precisely if you have access to summary information and visibility to potential trouble spots.

In Time and Labor 8.9, the approve payable time user interface has been enhanced with high-level summary information, such as total hours, total overtime hours, and absence hours, that can be configured to appear on the employee summary page. As a result, the approver can quickly identify individuals who may require further scrutiny. All others may be approved as a group. If an individual does require further scrutiny and, ultimately, hours adjustments, the approver may drill directly into the timesheet to make the changes.

Notifications alert managers to time that is awaiting approval and exceptions that need to be cleared. A manager receives only one notification per time administration process.

Manager Self-Service

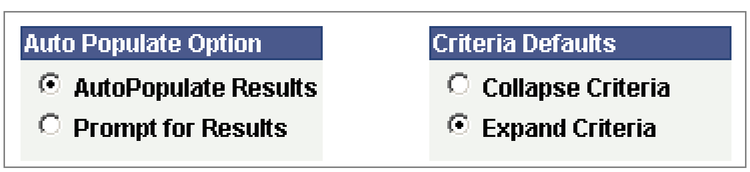
Managers need quick access to information and transactions. Time and Labor 8.9 provides a consistent interface in which managers and administrators can easily identify and navigate through the pool of employees in whom they are interested. Users can establish preferred employee criteria and default values. They can prepopulate lists with a subset of their overall employee pool, override criteria, and refresh the data. When the employee selection criteria are identified, the list persists throughout the application for easy navigation. A manager may navigate through the list by using next in list and previous in list capabilities, reducing the time it takes to complete tasks for multiple employees.

The following shows the configuration options for the manager search:

Manager Selection Criteria

Description	Include in Criteria	Include in List
Group ID	☑	☐
EmplID	☑	☑
Empl Rcd Nbr	☑	☑
Last Name	☑	☑
First Name	☑	☑
Business Unit	☑	☑
Job Code	☑	☑
Job Description	☑	☑
Department	☑	☑
Supervisor ID	☑	☑
Reports To Position Number	☑	☑
Location Code	☑	☑
Company	☑	☑
North American Paygroup	☑	☑
Global Payroll Paygroup	☑	☑
Workgroup	☑	☑
Taskgroup	☑	☑
Position Number	☑	☑

TL Installation – Manager Search Defaults page (1 of 2)



TL Installation – Manager Search Defaults page (2 of 2)

Financials Integration

Time and Labor 8.9 has enhanced ChartField and Projects integration, allowing more detailed analysis and reporting.

ChartField Integration

To operate and integrate consistently with PeopleSoft Enterprise Financial Management applications, Time and Labor 8.9 supports standard ChartField integration and individual ChartField entry. Organizations can analyze labor costs at the detailed ChartField level in General Ledger and Project Costing and can reconcile costs between the two applications.

Companies can associate time with any combination of ChartFields, regardless of whether or not they are using commitment accounting. ChartField combinations may be entered through a single code or may be entered or overridden at an individual level. ChartFields can be passed to Project Costing, PeopleSoft Enterprise Payroll for North America, and PeopleSoft Enterprise Global Payroll.

Time and Labor 8.9 also supports standard ChartField configuration, in which companies can re-order, re-label, or inactivate chartfields. The resulting configuration is consistently displayed on Time and Labor pages.

Projects Integration

Labor costs that are associated with projects and activities can be sent from Time and Labor to Project Costing for inclusion in project-based cost analysis and reporting.

Time and Labor 8.9 provides additional controls over the flow of data to Project Costing, allowing for tighter integration and improved performance. For example, only time transactions that have also reported a business unit, project, and activity are published to Project Costing. Companies can control which time reporting codes are sent to Project Costing.

Performance

Time and Labor 8.9 has enhanced the Time Administration process and group refresh functionality to improve and streamline performance.

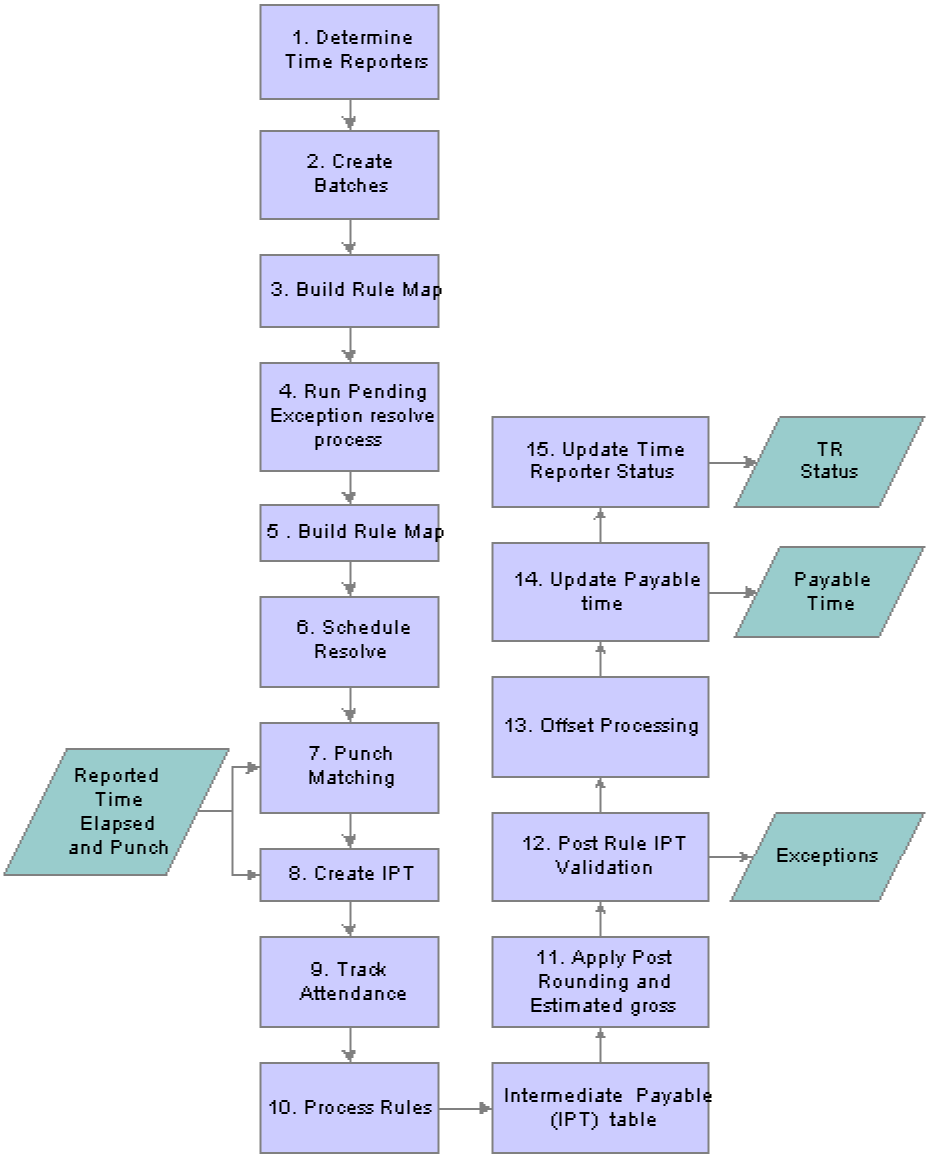
Time Administration

It is critical to convert reported time into payable time as quickly as possible. In Time and Labor 8.9, the central process of time administration is optimized. The number of temporary tables is reduced, redundant batches are eliminated, and processing loops are removed. Some processing logic has been moved forward to timesheet entry, such as punch duration calculations.

Exception processing has been improved, with exceptions being configurable for the Submit Time and Time Administration processes. The Time Administration process will reprocess pending time reporting exceptions and resolve exceptions, minimizing the need for manual intervention.

Exceptions, as with validations, are done outside the main processing loop.

The following diagram shows the Time Administration process flow:



Time Administration Process Flow

Dynamic Group Refresh

In today's dynamic work environments, employees are frequently coming, going, and moving around. To ensure that these employees do not slip through the cracks, employee groups must be refreshed quickly and efficiently. In Time and Labor 8.9, the performance of the dynamic group refresh process is improved by consolidating the process and reducing the number of deletes and truncates.

What's New in PeopleSoft Enterprise ePay 8.9?

When an organization has a large population of employees, multiple locations, or multiple business groups around the world, managing the payroll function can be a challenging, complicated, and time-sensitive task. ePay provides real-time, on-demand payroll information for employees. They can view their basic payroll information online and for PeopleSoft Enterprise Global Payroll country extensions print a copy of their latest earnings statement online. Most employees find it much easier to get the personal and payroll information they need through their organization's intranet than through traditional methods.

ePay features an extremely flexible and functional design. It is fully integrated with PeopleSoft Enterprise Payroll for North America and Global Payroll, and provides a quick return on investment for employers.

Ease of Use

ePay 8.9 includes features that make it easier for payroll managers to manage and process payroll as a result of employees being able to view their payslips online.

Online Payslip

Viewing an electronic payslip is the number one employee self-service transaction in the world today. Each country extension currently requires a separate payslip transaction, which is only delivered with a small number of country extensions. This transaction may not show the same information that employees receive in their paper payslips, which is confusing for employees. For users and for PeopleSoft, there is need to reduce the maintenance required to duplicate new enhancements across all the country extensions.

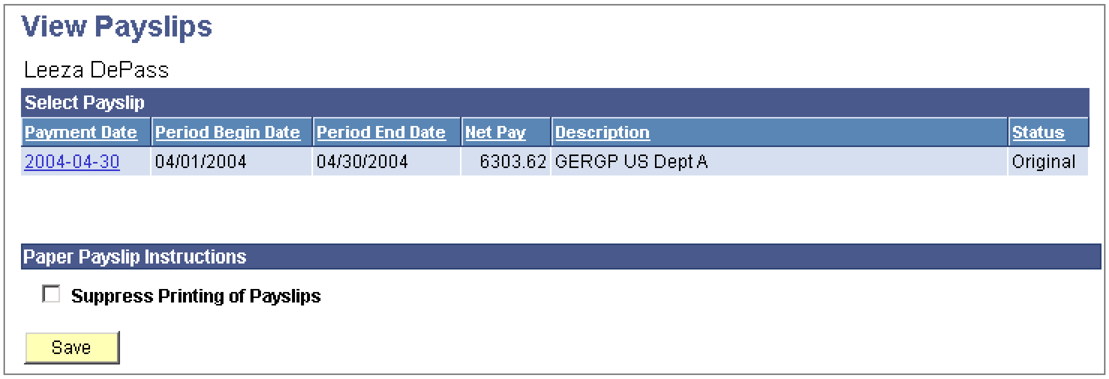
ePay 8.9 provides an online payslip that can be used by all country extensions supported by Global Payroll. Employees can view online a PDF file that is an exact copy of the paper payslip that they received. You create the PDF files when you generate payslips using the appropriate country extension's payslip run control page.

During the payslip creation process, the system:

1. Runs an SQR that creates a PDF file that is used to print the payslips.
2. Runs the GP_EPAY Application Engine process, which uses a utility to split the PDF file into individual PDF files for each employee.

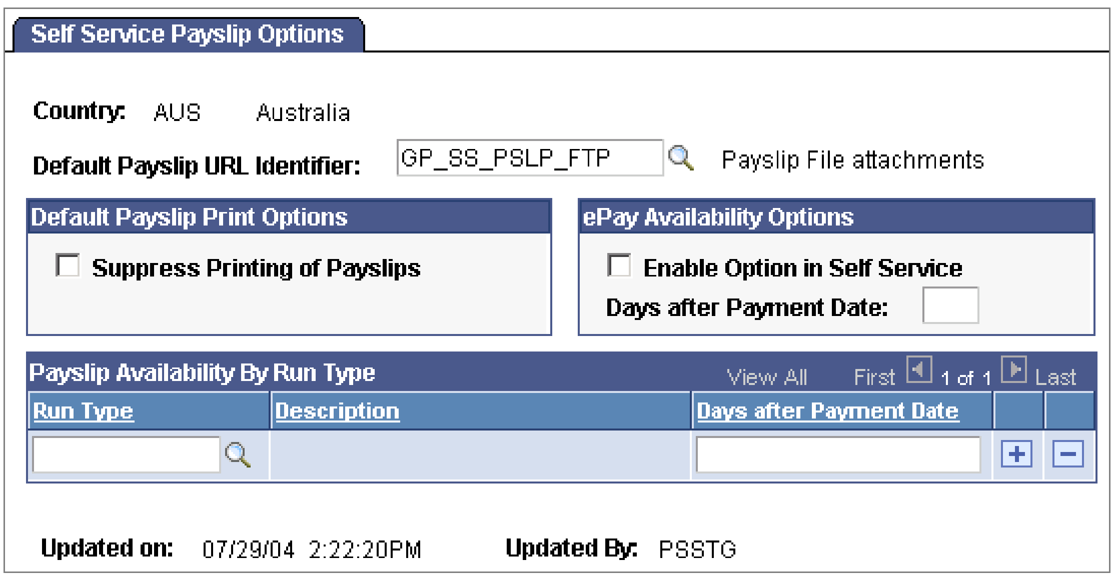
These individual PDF files are stored on a secure server. With a single transaction, you can provide the information that is specific to the employee's country, thereby lowering your total cost of ownership.

Employees access these individual PDFs through the View Payslip page. This page lists all payslips available, in groups of 10. To display the detailed payslip, the employee clicks the date link.



View Payslips page

ePay 8.9 enables you to designate when online payslips become available for viewing; you can specify a number of days before or after the payment date. You can also specify different availability dates for online payslips from different run types.

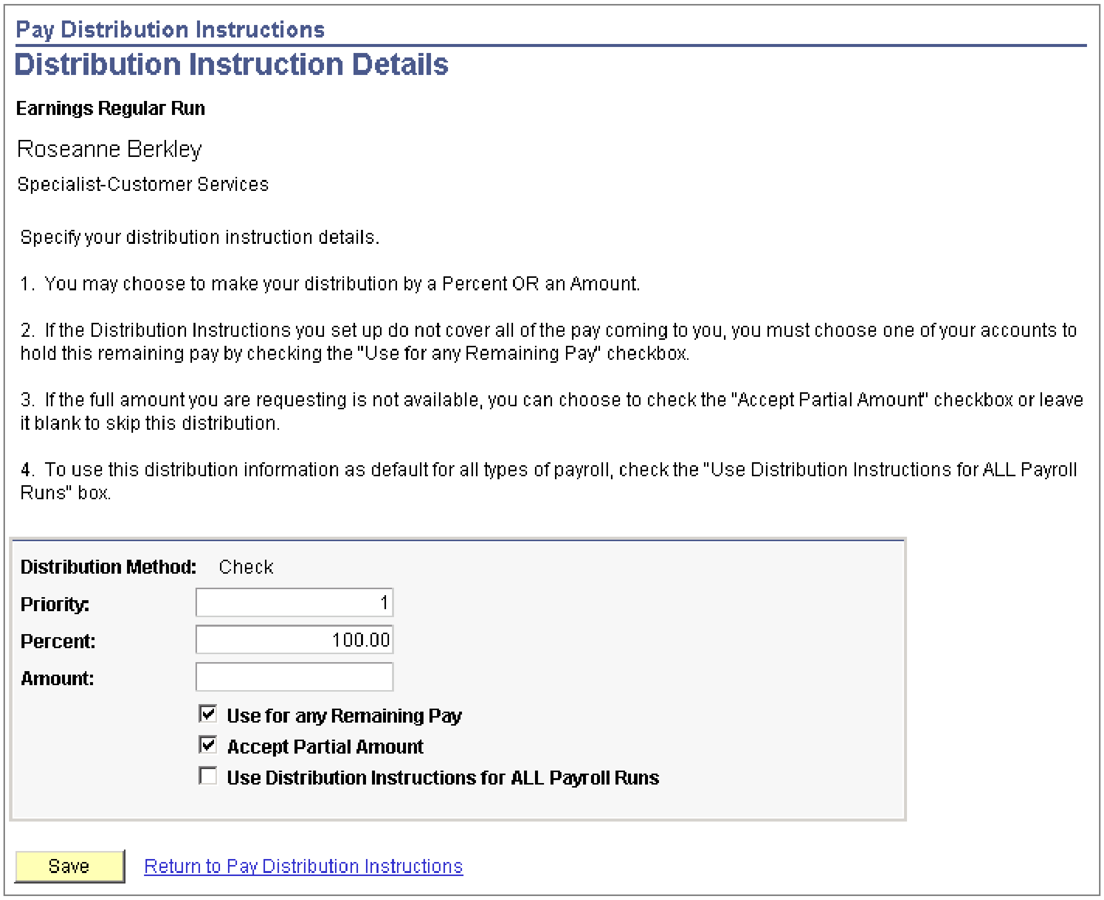


Self Service Payslip Options page

For some countries, we also provide the ability to indicate whether you want to provide only online payslips, with no paper payslips. Doing so can lower your organization’s expenses even more by eliminating printing and delivery costs. For some countries, we also provide the ability to indicate whether you want employees to be able to request online payslips only on the View Payslips page. You specify whether to use these two options on the Self Service Payslip Options page.

Additional Instructions for Employees

In ePay 8.9, the Distribution Instruction Details page has text that informs employees how to set their net pay elections. These instructions help minimize errors in employees' net pay elections that can generate errors during the payroll process.



Distribution Instruction Details page

What's New in PeopleSoft Enterprise Absence Management 8.9?

Employee absences are the largest remaining unmanaged employer benefit. Absence is a particular issue for small to medium-sized businesses in which an absent employee can make a huge difference to the smooth function of the organization. For larger organizations, managing multiple absence systems can be costly and inefficient.

Absence Management is an innovative absence management system that gives you control over absence planning and compensation operations—even in a multinational environment. It combines employee and manager capabilities and tracks all absences in a single, powerful, web-deployed application. It's easy to use, configurable, and flexible enough to meet the most complex needs in absence management. Whether your operations are solely in one country or in a multinational environment, you can tailor this solution to meet your operational needs. It is scalable enough to grow with your organization.

Organizations have been searching for a flexible, robust absence solution that employees and managers can easily use on a daily basis. Through diligent research and customer focus groups, Absence Management was designed to meet today's leading requirements around the world. Although Absence Management is built on the proven functionality of PeopleSoft Enterprise Global Payroll and is included with Global Payroll, it is now a standalone module, which enables customers who use PeopleSoft Enterprise Payroll for North America or a third-party payroll solution to use Absence Management.

The rules-based engine and scaleable platform enable you to operate and administer employee absences that fully comply with local requirements around the world. You can process absences for payment in a centralized or decentralized environment. This flexibility in deployment and administration enables you to leverage a single application across your organization without customization or interfaces. Absence Management enables you to define and implement best practices across your organization even as you adhere to regional differences.

Absence Management 8.9 was built with special emphasis on:

- User-friendly employee and manager self service.
- Delivered integration to Payroll for North America and Payroll Interface.

Absence Management Features

Absence Management 8.9 delivers a robust feature set to assist organizations in all their time-off management activities and processes. In a single installation, Absence Management 8.9 enables organizations to automate the processes around planning for and managing absences, and later compensating paid time off for their entire worldwide workforce.

New or expanded features by role are detailed in the following table:

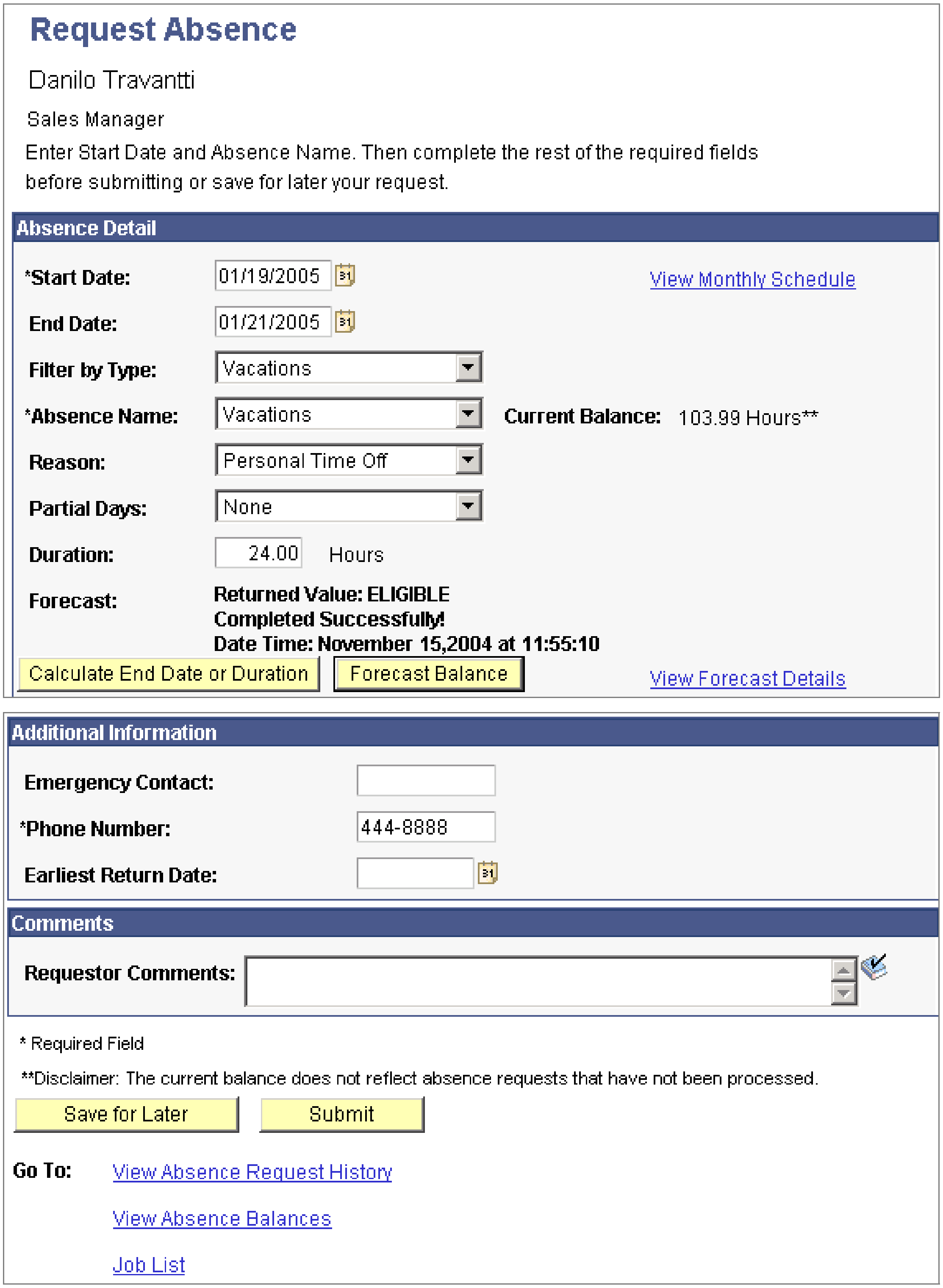
Feature	Roles
Simple and efficient employee self service to submit absence requests and view status.	Employee
Simple and efficient employee self service to view absence history and track approvals for employee-initiated absence requests.	Employee
Simple and efficient employee self service to view current and projected absence balances.	Employee
Simple and efficient manager self service to submit absence requests on behalf of employees.	Manager

Feature	Roles
Simple and efficient manager self service to view current and projected absence balances for employees.	Manager
Simple and efficient manager self service to act on (approve, deny or push back) absence requests.	Manager
Highly configurable request approval functionality, including multi-level approvals and alternate approvers.	Absence Management Administrator
Highly configurable absence accrual functionality, including a rules engine to compute the most complex accrual logic.	Absence Management Administrator
Highly configurable absence consumption (absence take) functionality, including a rules engine to compute the most complex consumption logic.	Absence Management Administrator
Highly configurable self service transactions for tailored terminology (absence, leave, time-off, etc.), and capture of data for different types of absences.	Absence Management Administrator
Ability to export computed absence results (by employee and pay period) to Payroll for North America for actual payment.	Absence Management Administrator
Ability to export computed absence results (by employee and pay period) to PeopleSoft Enterprise Payroll Interface for actual payment.	Absence Management Administrator
Ability to export computed absence results (by employee and pay period) to PeopleSoft Enterprise Time and Labor for eventual cost distribution. Payable time is created in Time and Labor and then sent to Payroll for North America. After the payroll is confirmed, cost information is returned to Time and Labor.	Absence Management Administrator
Ability to use common scheduling components that are shared with Time and Labor and Global Payroll. These components have been significantly enhanced in release 8.9.	Absence Management Administrator
Ability to use delivered off-cycle functionality to process absences outside of the normal processing cycle.	Absence Management Administrator
Highly configurable administrator absence reporting and inquiry tools.	Absence Management Administrator

The sections that follow describe a more detailed overview for each of the major new enhancements in Absence Management 8.9.

Employee Self Service: Submit Absence Request

Absence Management 8.9 enables employees to submit a time-off request with a minimum of clicks. The user interface displays only the required amount of information needed to submit the request and is tailored to each kind of absence (sick, vacation, and so on). This capability allows for a fast, user-friendly process that minimizes—if not eliminates—calls to your help desk, paper-based processes, and manual data entry.

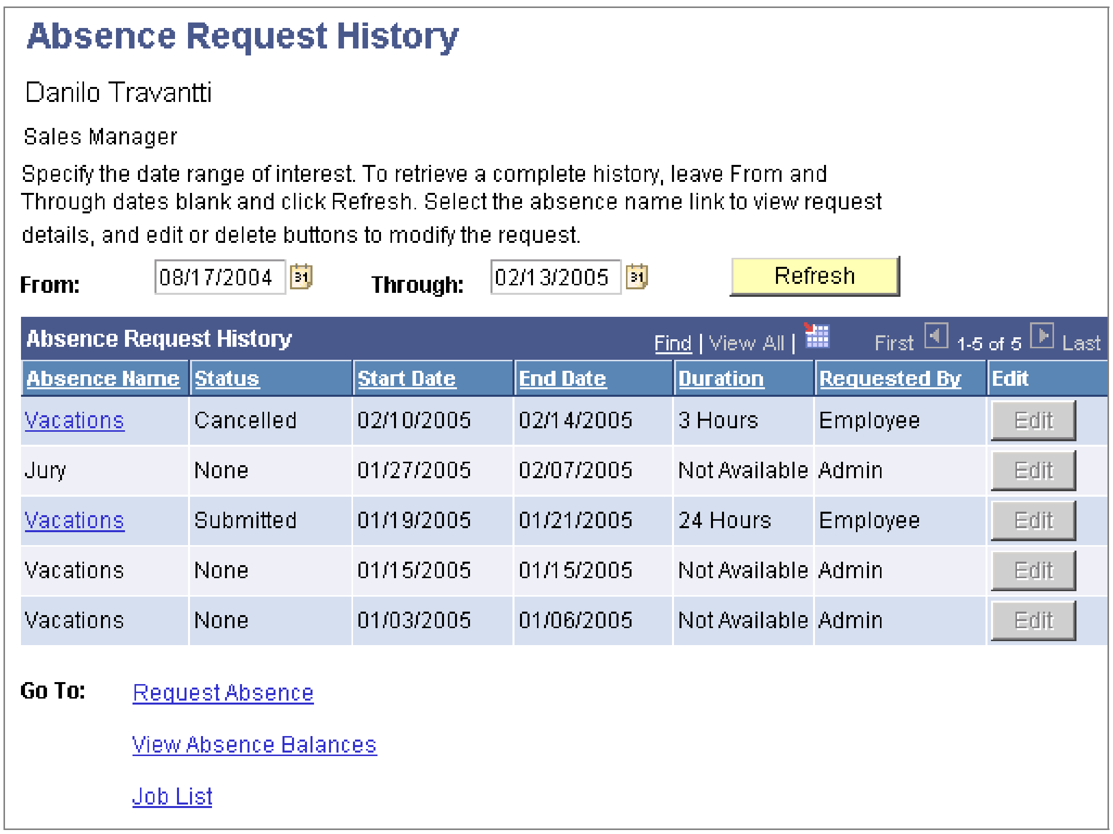


Requesting an absence

The Absence Request page consists of three group boxes: Absence Detail, Additional Information, and Comments. The available fields in the Additional Information group box depend on how your organization sets up self service for Absence Management.

Employee Self Service: Absence Request History

The Absence Request History page displays a list of the employee's absence requests for a specific default range of dates that the employee can change and refresh the list. Links appear for the absence requests that the employee entered. These links enable the employee to track the status of these requests through the approval process. Absence events that were entered by the absence administrator or the employee's manager do not have a link on the employee's self service absence page and cannot be reviewed by the employee.



Absence Request History

Danilo Travantti

Sales Manager

Specify the date range of interest. To retrieve a complete history, leave From and Through dates blank and click Refresh. Select the absence name link to view request details, and edit or delete buttons to modify the request.

From: 08/17/2004 Through: 02/13/2005 Refresh

Absence Request History Find | View All | First 1-5 of 5 Last

Absence Name	Status	Start Date	End Date	Duration	Requested By	Edit
Vacations	Cancelled	02/10/2005	02/14/2005	3 Hours	Employee	Edit
Jury	None	01/27/2005	02/07/2005	Not Available	Admin	Edit
Vacations	Submitted	01/19/2005	01/21/2005	24 Hours	Employee	Edit
Vacations	None	01/15/2005	01/15/2005	Not Available	Admin	Edit
Vacations	None	01/03/2005	01/06/2005	Not Available	Admin	Edit

Go To: Request Absence

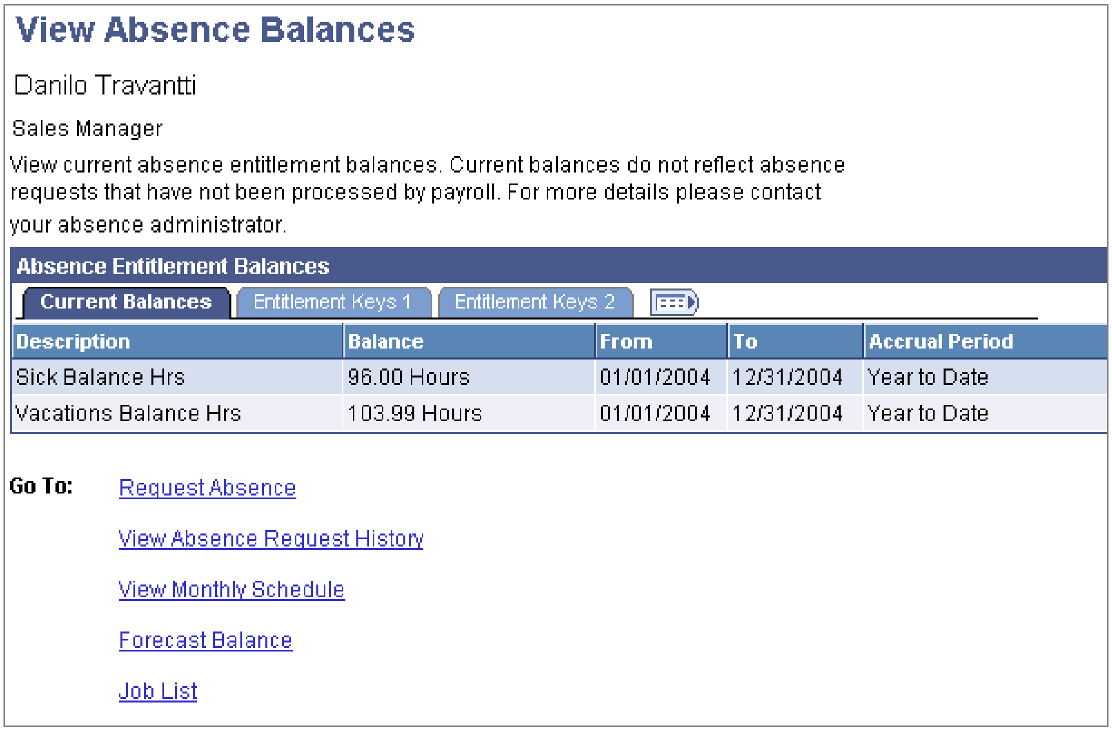
View Absence Balances

Job List

Reviewing absence requests and approvals

Employee Self Service: View Balances

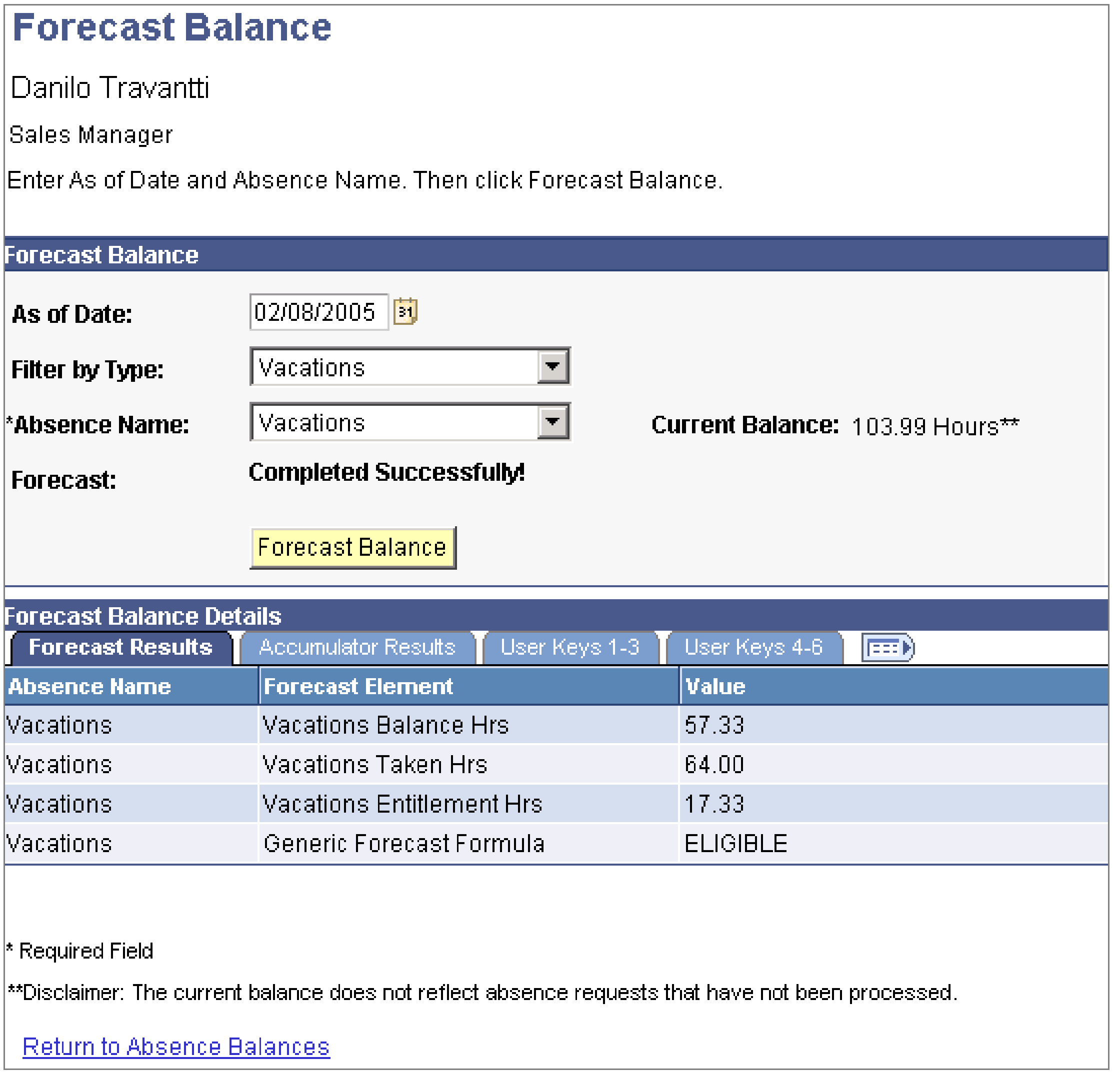
Absence Management 8.9 enables employees to easily view their current absence entitlement balances.



Viewing absence balances

Employee Self Service: Forecast Balances

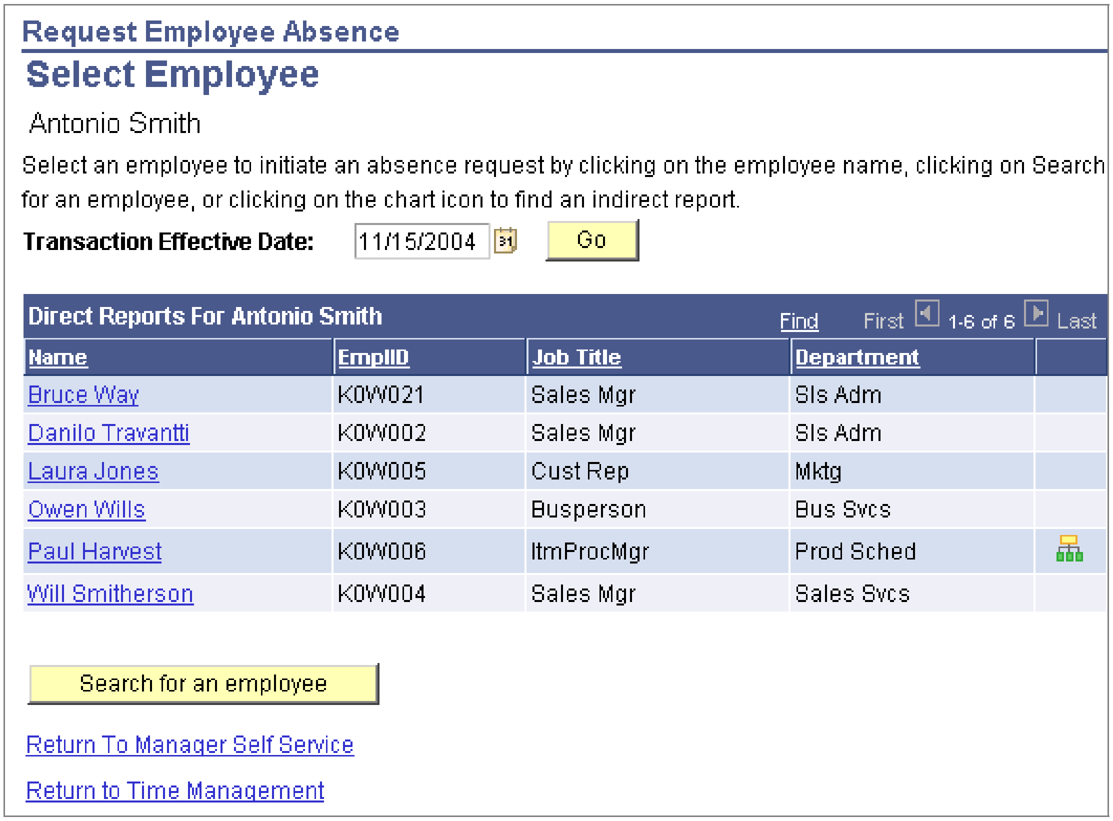
Employees can click the Forecast Balance link that appears on employee self service pages to calculate projected absence entitlement balances as of a future date. This feature enables employees to analyze and plan their leave ahead of time and helps prevent situations in which employees would have to take leave without pay. Now, employees can access their absence information, reducing inquiries to the HR department.



Forecasting absence entitlements and takes

Manager Self Service: Submit Absence Request

Absence Management 8.9 enables managers to easily submit a request to take time off on behalf of one of their employees. The user interface display is simple and easy, showing all pertinent information needed to submit the request, and is tailored to each kind of absence (sick, vacation, and so on). Through this easy-to-use self service interface, managers and employees can spend less time managing time off and more time on productive work that impacts the bottom line.



Requesting an absence on behalf of an employee

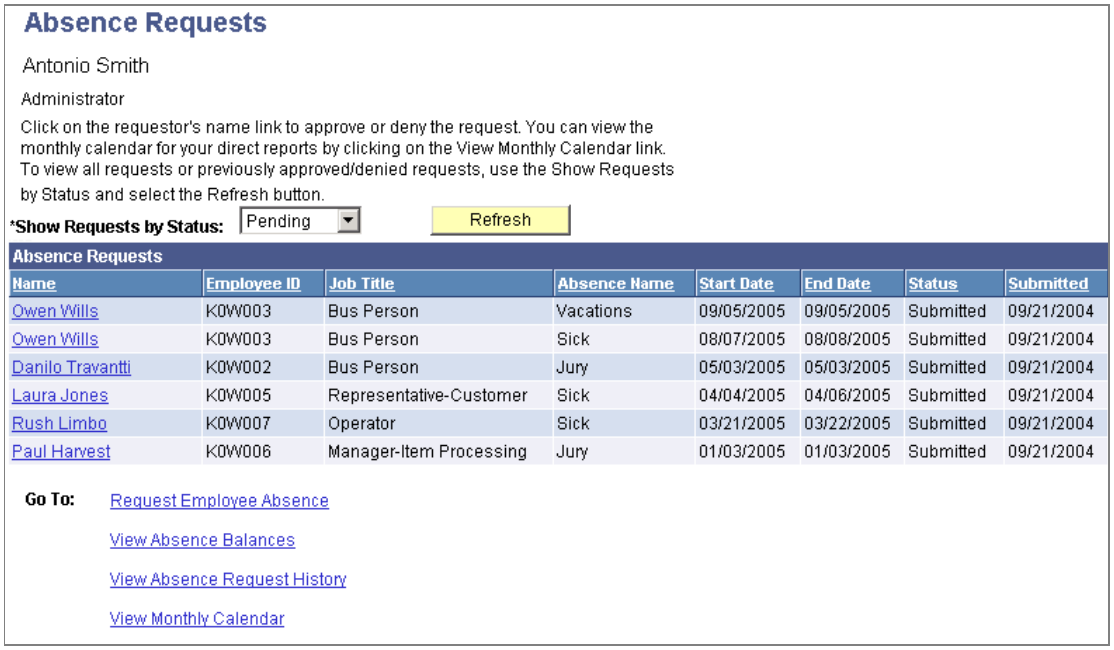
The manager clicks the employee name link on whose behalf the absence event request is being created. The Request Absence page that appears is identical to the employee self service Request Absence page, except that it contains a link to return to the Request Employee Absence – Select Employee page so that the manager can continue to enter absence requests for other direct reports.

Manager Self Service: View Balances

Absence Management 8.9 enables managers to easily view their employees' current or projected absence entitlement balances. By default, current balances are displayed. The Forecast Balance option allows the balance as of a future date to be projected. Employees and managers no longer have to spend time searching paper trails or manually calculating what entitlements and balances should be. Now, managers can understand available time off and manage employee time off efficiently, eliminating paper-based reports and inquiries to the HR department.

Manager Self Service: Review Requests

Absence Management 8.9 enables managers to easily call up a list of all absence requests that are awaiting approval (pending), approved, or denied. The list can be sorted and filtered a variety of ways for easy visualization and management. Now, managers have a single access point to all absence requests while workflow enables paperless business processes and more efficient task completion.



Absence Requests

Antonio Smith

Administrator

Click on the requestor's name link to approve or deny the request. You can view the monthly calendar for your direct reports by clicking on the View Monthly Calendar link. To view all requests or previously approved/denied requests, use the Show Requests by Status and select the Refresh button.

*Show Requests by Status: Pending Refresh

Absence Requests

Name	Employee ID	Job Title	Absence Name	Start Date	End Date	Status	Submitted
Owen Wills	K0W003	Bus Person	Vacations	09/05/2005	09/05/2005	Submitted	09/21/2004
Owen Wills	K0W003	Bus Person	Sick	08/07/2005	08/08/2005	Submitted	09/21/2004
Danilo Travantti	K0W002	Bus Person	Jury	05/03/2005	05/03/2005	Submitted	09/21/2004
Laura Jones	K0W005	Representative-Customer	Sick	04/04/2005	04/06/2005	Submitted	09/21/2004
Rush Limbo	K0W007	Operator	Sick	03/21/2005	03/22/2005	Submitted	09/21/2004
Paul Harvest	K0W006	Manager-Item Processing	Jury	01/03/2005	01/03/2005	Submitted	09/21/2004

Go To: Request Employee Absence

View Absence Balances

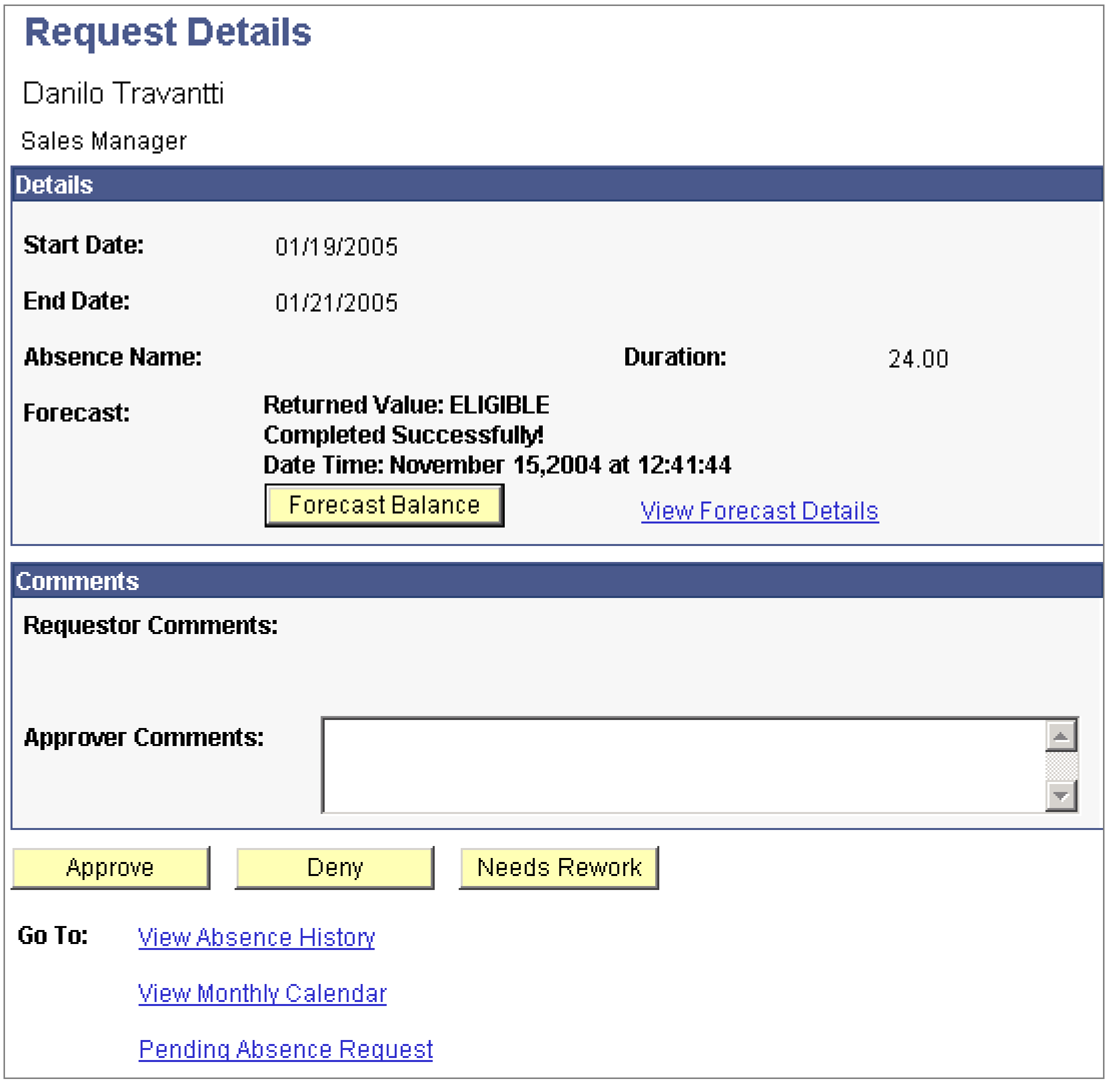
View Absence Request History

View Monthly Calendar

Managers review all pending absence requests for direct reports

Manager Self Service: Request Details

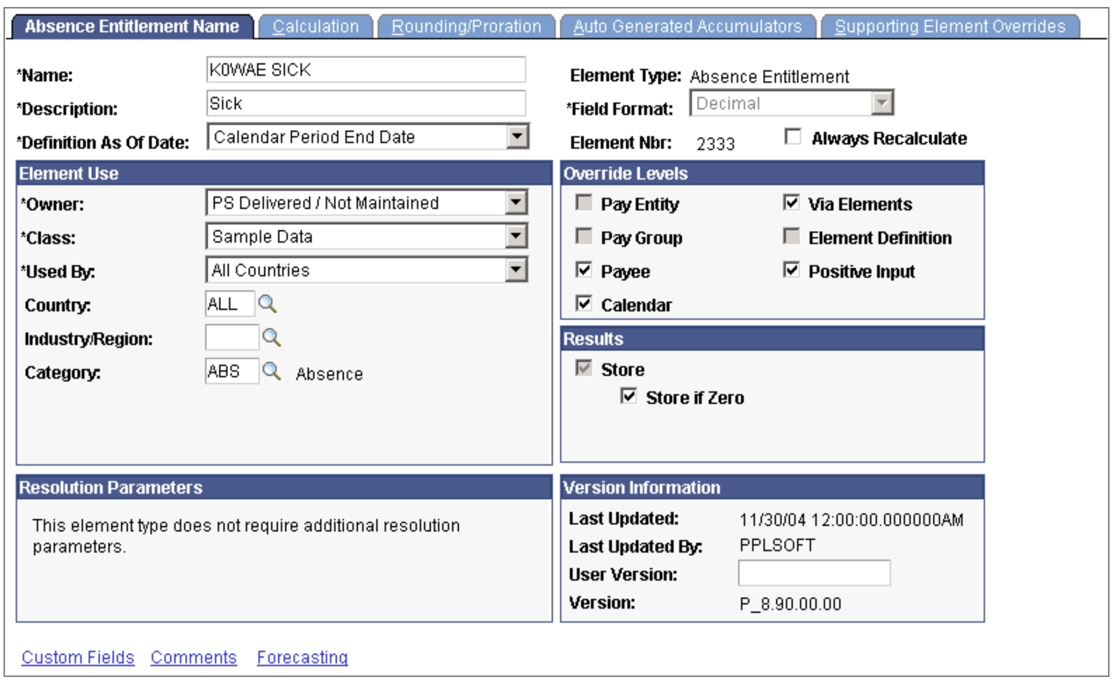
The manager uses the Request Details page to approve, deny, or push an absence request back to the previous step in the approval process. The manager can forecast the employee's absence balance to verify eligibility for the type of absence requested.



Request Details page

Rules-Based Engine Computes Complex Accrual Logic

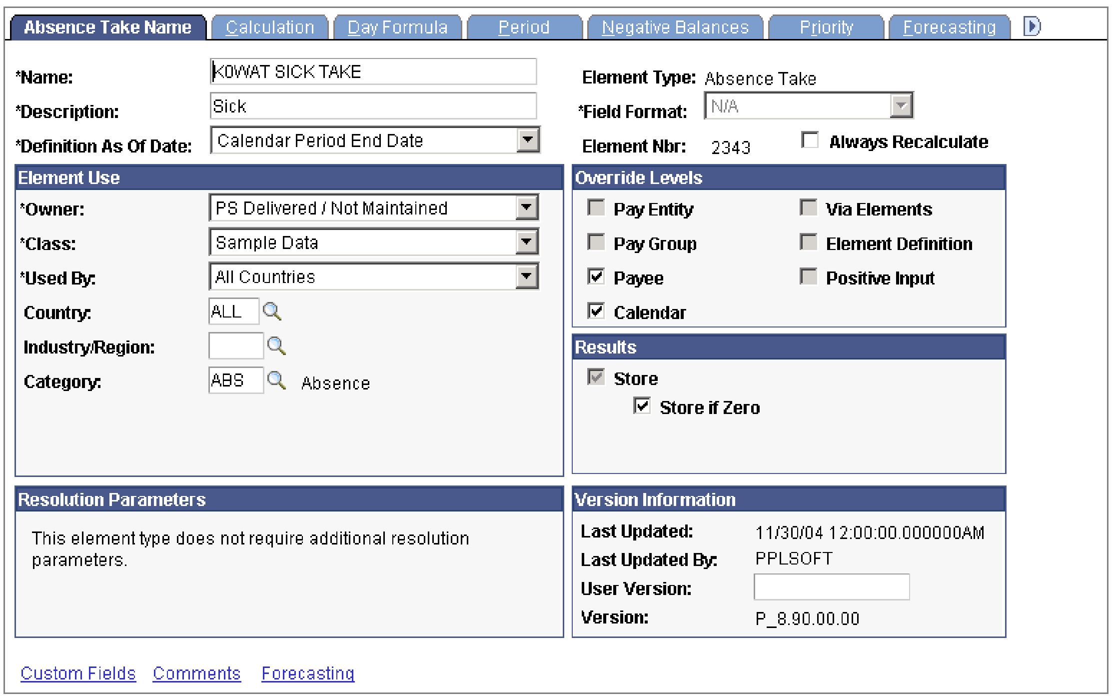
Absence Management 8.9 provides highly configurable absence accrual functionality. This functionality is identical to core functionality in Global Payroll, which has already proven its ability to model absence accrual needs in more than two dozen countries. For example, with each user-defined absence entitlement (vacation, sick, FMLA, and so on), you can indicate whether it accrues per period (such as biweekly) or per absence (such as 180 days per maternity leave). You can also define eligibility rules that govern when each accrual should occur (based on hours worked, longevity, and so on). The configurable rules engine gives you powerful flexibility. When you need to make changes to the logic used to determine accruals, no programming is required. The rule formula merely needs to be edited by your administrator. This flexibility enables organizations to leverage one integrated system throughout the enterprise and translates into decreased administrative costs and reduced IT resources required to maintain and manage the system.



Absence entitlements are set up using this component

Rules-Based Engine Computes Complex Absence Consumption Logic

Absence Management 8.9 provides highly configurable absence consumption functionality, or *absence takes*. This functionality is identical to core functionality in Global Payroll, which has already proven its ability to model needs in more than two dozen countries. For example, with each user-defined absence use, or Take, you can indicate how it draws down one or more accruals and with what priority (perhaps the first 10 days of sick time are paid as sick time while the next six weeks are paid against a short-term disability benefit). When you need to make changes to the logic that is used to determine decrementing balances, no programming is required. The rule formula merely needs to be edited by your administrator. This flexibility enables organizations to leverage one integrated system throughout the enterprise, resulting in elimination of manual intervention, reduction in errors, and decreased administrative costs.



Absence Takes are set up using this component

Highly Configurable Absence Terminology

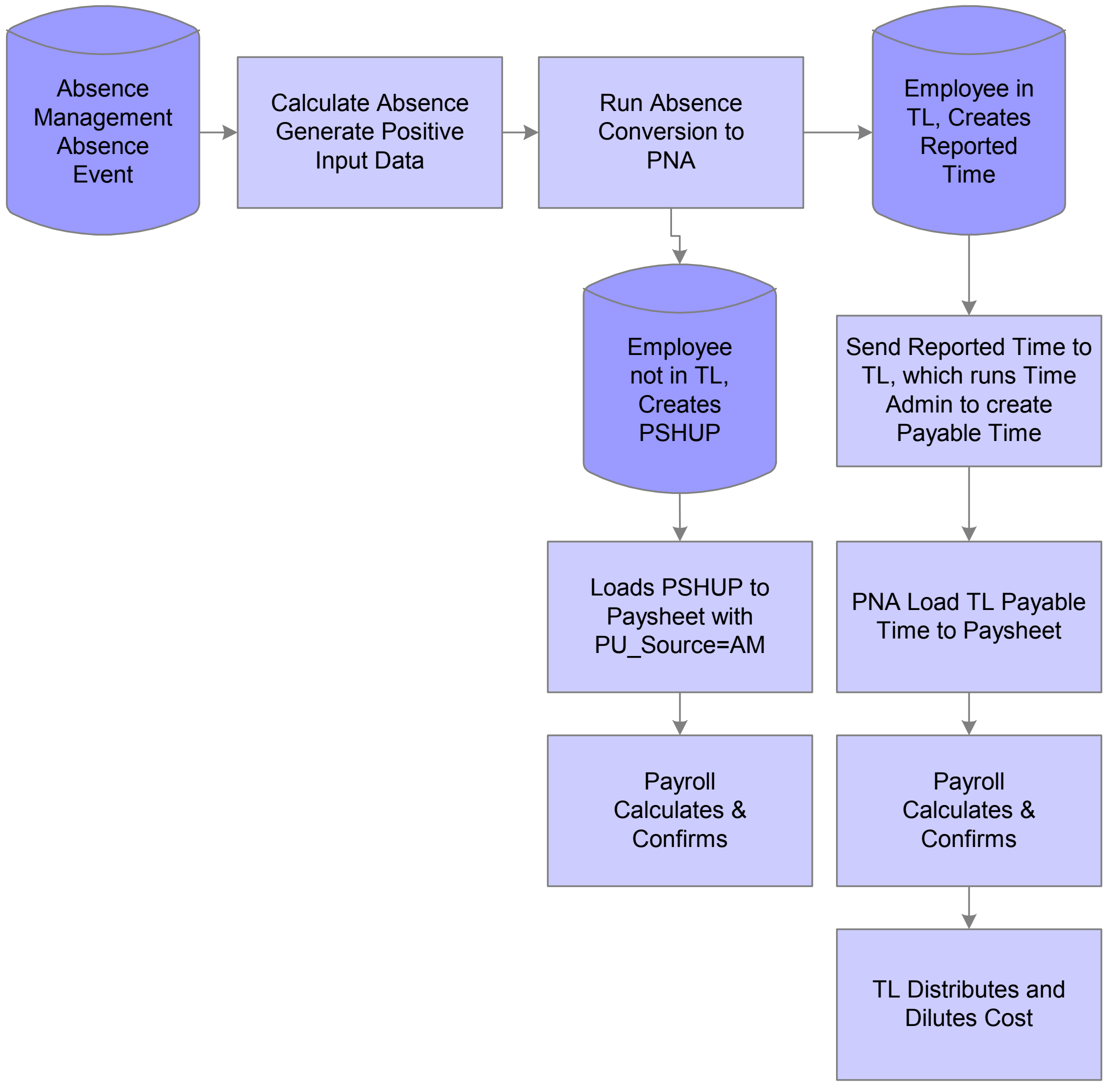
Absence Management 8.9 enables you to change the terms viewed in self service pages so that they can better match local needs. For example, *absence request* can be displayed as *leave request* (Australia) or *time off request* (United States). This flexibility enables you to use a single system that requires no customization to accommodate regional and organizational differences.

Integration to PeopleSoft Enterprise Payroll for North America

Within the PeopleSoft Enterprise Human Resources today, the Base Benefits Leave component is integrated with Payroll for North America. Historically, this was the only leave functionality available to our North American customers. As absence management has become a key focus among United States companies, the requirements have become more complex and demanded a more robust and flexible solution.

Global Payroll has provided our global customers with Absence Management to manage leave accruals, Takes, and balances. This solution is far more flexible and robust than the Base Benefits Leave solution because it uses a rules-based engine. It allows customers to create any type of Take or entitlement rule they need. For Absence Management 8.9, we deliver Absence Management independently from Global Payroll so that it can be used by customers who use a third-party payroll or Payroll for North America. They can address more complex absence requirements with a rules-based solution.

Absence Management provides two types of integration to Payroll for North America, either directly or through Time and Labor. To enable direct integration between Absence Management and Payroll for North America, Absence Management 8.9 delivers the ability to export computed absence results (by employee and pay period) for actual payment. Only a minimum amount of setup is required to map absence payment concepts to an existing Payroll for North America system. Customers who use Payroll for North America can use an integrated, robust absence management solution without spending time, effort, and money on customizations to meet their absence management needs.

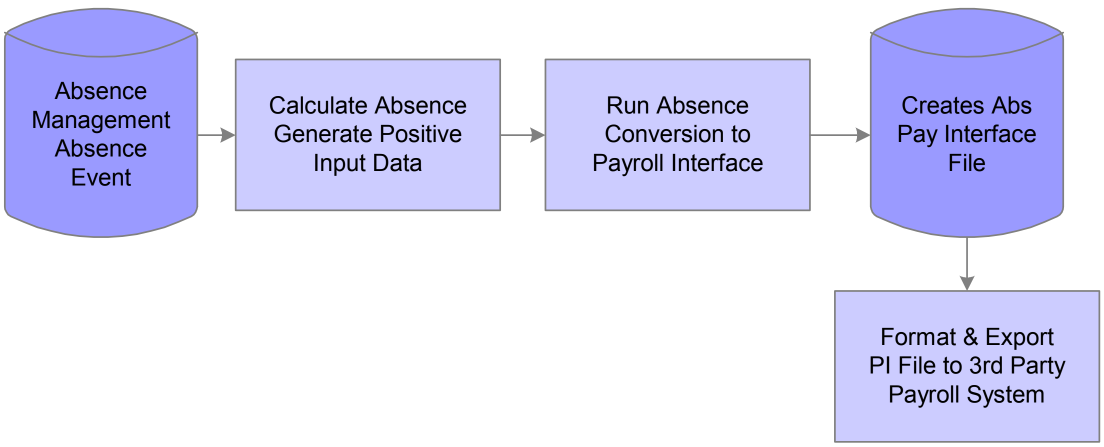


Absence Management Integration to Payroll for North America, with or without Time and Labor

For customers who use both Payroll for North America and Time and Labor, the functionality in Absence Management 8.9 includes the ability to export computed absence results (by employee and pay period) to Time and Labor. Time and Labor converts this information into payable time and adds sequence and reference numbers for eventual cost distribution. This integration eliminates double entry and custom interfaces while enabling paperless business processes.

Integration to Payroll Interface

To enable the integration between Absence Management and third-party payrolls, Absence Management 8.9 enables you to export computed absence results (by employee and pay period) for actual payment. On top of the Payroll Interface regular setup only a minimum amount of setup is required to map absence payment codes to existing payroll interface codes. Now, customers who use third-party payrolls can use an integrated, robust absence management solution without spending time, effort, and money on customizations to meet their absence management needs.

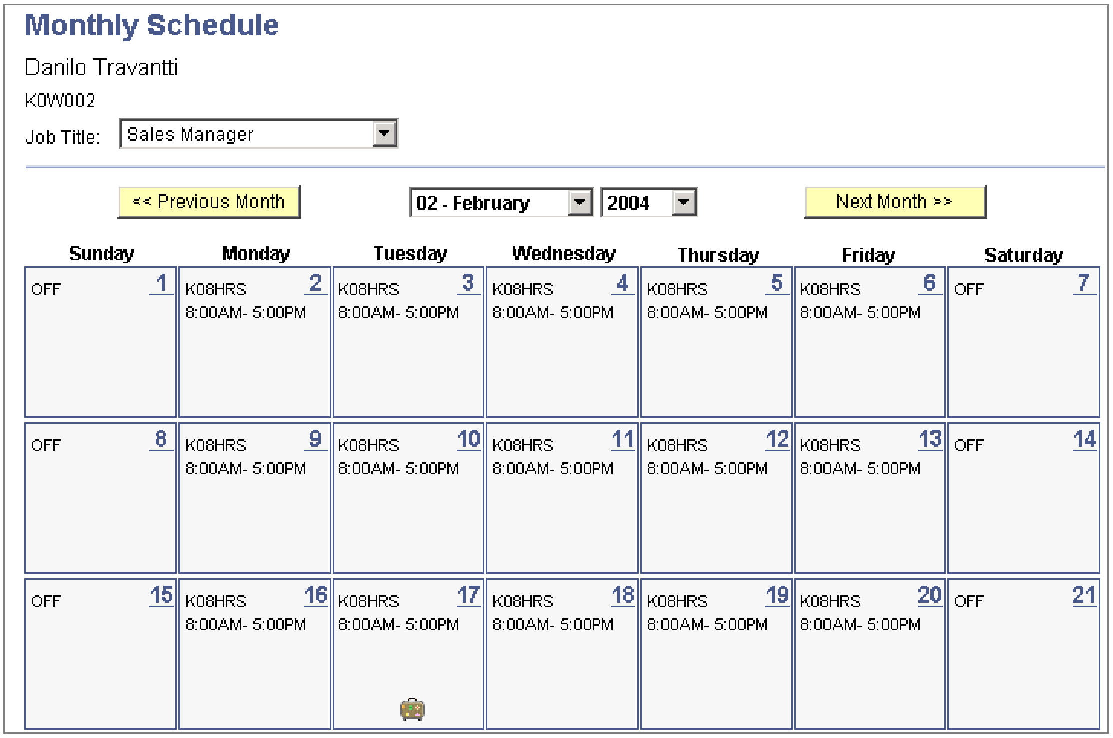


Absence Management Integration to Payroll Interface

Shared Scheduling Components

Employee Self Service: View Monthly Schedule

Employees click the View Monthly Schedule link to review their monthly schedule for past or future months.



Monthly Schedule page

Employees can view their schedule one month at a time

Absence Management includes scheduling components that are also included in Time and Labor. These components have been significantly enhanced for release 8.9. These powerful new features include:

Enhanced Self-Service Scheduling Pages For Managers And Employees

Managers can use a graphical interface to view schedules, find replacements, swap shifts, and perform other scheduling functions. Employees can enter scheduling preferences and view contact information.

Streamlined Approach to Building Work Schedules

You can use a single component to create work schedules, or you can build work schedules from reusable shift and workday definitions. Clicking the View Calendar button while creating a schedule enables you to see what the schedule will look like for a given range of dates.

Ability to Create Personalized Schedules for Individual Employees

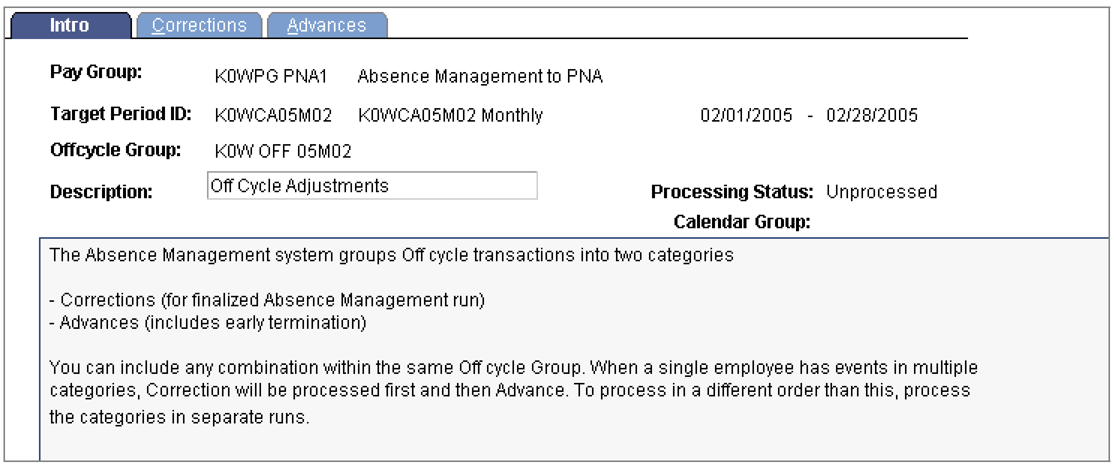
Administrators and managers can create an ad hoc work schedule, as needed, to assign to a specific employee.

Rotating Schedules

Work schedules can include a set of rotations with relative start dates. For example, Crew A may start its rotation on day one of the pattern and Crew B may start on day seven.

Off-cycle Functionality

With off-cycle functionality, you can process absences outside of the normal processing cycle. Absence Management supports two types of off-cycle transactions: corrections and advances. Correction transactions correct the results of a finalized absence run. For example, you can reverse an absence entitlement that was made to a payee in error. Advance transactions process absences before the normally scheduled run, enabling you to calculate absence information for terminations and leaves of absence in advance.



The Off-cycle component processes absences outside the normal schedule

Administrator Reporting and Inquiry Tools

Administrator reporting and inquiry tool that are enhanced in this release include:

Payee Messages Report

This report lists messages that are created during the absence process for a selected population. Administrators can use the report to identify employees who may need further editing before the absence process can be finalized.

Administrator Review of Absence Results

Two options are available for viewing results of absence processing. Administrators can use the delivered set of inquiry pages to see very detailed results or they can use inquiry pages that you configure to display only the information that you deem relevant to your business needs.

In Summary

To be competitive in the worldwide marketplace, employers must adopt a worldwide view of their human resource issues, including absence management. To better manage absence, employers need to make significant progress in measuring the impact of absence on their organizations. Many employers do not consistently track unscheduled absences. In the United States, for example, almost two-thirds of employers do not know what their absence rate is or how their experience compares with that of their competitors. Absence Management helps you to manage, track, and analyze all of your organization's absence-related needs, directly improving your bottom line.

What's New in PeopleSoft Enterprise HCM Warehouse 8.9?

HCM Warehouse is not part of PeopleSoft Enterprise HRMS, however information on HCM Warehouse is presented here to inform all customers that it is available as a unique and valuable extension for reporting and analytics.

Again, HCM Warehouse as described below is not part of the HRMS product. It is a separately priced product that compliments HRMS.

Are you satisfied with your ability to analyze data from your HRMS system? Are your headcount and employee turnover analytics working for you? When you have questions about summary analytics are you able to drill-down to detail? At the detail level are you able to create your own ad hoc queries and reports? If not, *are you still completely dependent on programmers to create reports and analytics for you?*

PeopleSoft's all new HCM Warehouse 8.9 (formerly named HRMS Warehouse) is now your answer to these and other information access requirements. Redesigned to capture detailed data on a daily basis, HCM Warehouse collects your workforce data and helps you effectively answer human capital management questions that impact your business.

Key Features

Here are the key features of HCM Warehouse:

- Greatly expanded content depth and breadth.
- Support for daily operational reporting and ad hoc queries.
- Drill-down from analytics to detailed list-style reports.
- 150 pre-packaged HR performance metrics.
- Support for ad hoc analytics and custom extensions to delivered metrics.
- Ability to perform comparisons and trending via time series analysis.

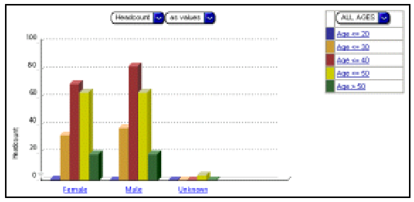
Expanded Depth and Breadth

HCM Warehouse has been expanded by more than 200% in all areas of existing content including Recruitment, Benefits, Workforce, Workforce Actions, Health & Safety, Training, Leave & Absence, Compensation and Organizational Effectiveness to include more detail to support operational reporting. Entirely new areas of content have been added for Learning Management, Accomplishments, Competencies and ePerformance.

New Reporting Capabilities

The most frequently requested feature from customers has been to include support for operational reporting in the warehouse. Responding to this request, PeopleSoft has redesigned the HCM Warehouse to contain a new level of detail. Most warehouse tables now store their transformed data at a transaction level rather than pre-aggregated monthly values. With this new expanded, detail HCM Warehouse 8.9 now supports daily operational reporting.

With new Business Intelligence (BI) tools from Cognos, Microstrategy and Business Objects, ad hoc reporting can be extended much more broadly than ever before. These new BI tools offer ease-of-use features for knowledge workers, business analysts and managers. When new tools are applied to HCM Warehouse, ad hoc reporting by end-users becomes a reality. Drill-down from summary analytics to detailed list-style reporting will be available from a single integrated data repository, the new HCM Warehouse.



Termination Headcount

Department	EmplID	Name	Age Group	Years of Service
Human Resources - Australia	KA0002	Kerr,Elizabeth	Age 30 - 39	19
Finance	C10001	Stankowski,Richard	Age 00 - 29	
Recruiting - Italy	KIG012	Fermi,Enrico Mr.	Age 30 - 39	8
Finance - Australia	KA0007	Pearce,Warren Frank	Age 40 - 49	5
Recruiting - Italy	KIG017	Mazzini,Giuseppe Mr.	Age 30 - 39	3
Human Resources-Italy 2	KIG019	Cesare,Giulio Mr.	Age 50 - 59	17
Finance - Malaysia	KM0013	Tan,An Ni	Age 00 - 29	7
Finance - Malaysia	KM0014	Kandasamy,Bara	Age 40 - 49	6
Sales Operations - Malaysia	KM0015	Heng,Tong Fatt	Age 00 - 29	5
Sales Operations - Groningen	KN0004	Aafjes,Jan	Age 50 - 59	13

Leveraging the New 8.9 HCM Warehouse: Analytics and Detail

Modular Data Marts and Expanded Analytic Capabilities

Managers often need more than just operational data. They need to see patterns and trends in the workforce, such as what types of employees are voluntarily leaving the company and how long it takes to fill an open job requisition. In order to provide customers with the maximum flexibility possible, metrics are now derived using BI tools rather than being pre-aggregated for you. With world-class BI tools and detailed content, customers are able to modify and extend metric definitions more easily than ever before.

For customers who wish to roll out HCM Warehouse functionality using a phased approach, we provide the tools and capabilities for you to more easily implement portions of the HCM Warehouse at any one time. With 8.9, customers are able to purchase individual data marts. Modular data marts, along with PeopleSoft's new ETL technologies, enable customers to implement HCM Warehouse solutions that fit their unique business requirements, budgets and time-lines.

Recruiting Mart

Who you hire and how you hire is a critical source of competitive advantage. Attracting people with the right skills and experience takes information, judgment, speed and efficiency. The Recruiting Mart helps answer critical questions about the recruiting process, such as are you filling positions in a timely manner? Who are your applicants, and where were they sourced? Which job postings produced the best candidates? The Recruiting Mart helps ensure you make the most of your recruiting efforts to hire the best candidates.

The Recruiting Mart includes additional recruitment content around job openings, recruiters, positions, applicants, referrals, and status codes, among many others. These are in addition to the many performance metrics related to recruitment and staffing that are available, such as years of experience, cost to hire, application offer duration, time to fill factors and acceptance ratios.

Workforce Profile Mart

Transform your information on workforce assignments, turnover, jobs, health and safety, organizational effectiveness into actionable intelligence with the Workforce Profile Mart. This mart helps answer questions such as, where are you over-staffed or under-staffed? Do you have high levels of injury or illness in some locations and not others? Do you have involuntary separation issues in any of your divisions? Is your workforce churn similar across business units? Optimize your global workforce with analytics and reporting in the Workforce Profile Mart.

This data mart provides more detailed content for workforce and workforce actions than ever before, including employee IDs, person names, positions, job codes, pay groups, EEO classifications, FTE, FICA status, health and safety rates and more. Metrics include average salary gap amount, injury illness lost time, voluntary separation ratio and many more.

Compensation Mart

This mart helps you assess the effectiveness of your benefit and compensation programs. Use detailed information to answer such questions as, are your employees enrolling in benefit programs as you expected? Do you have over- or under-enrollments? Are you compensating your top performers adequately? Can you identify absentee problems before they affect organizational performance?

The Compensation Mart provides comprehensive reports and metrics to help answer these human resource challenges. Content has been expanded around benefits, compensation, payroll and absence, including benefit programs, plan types, providers, enrollments, earnings codes, regular earnings, absence codes, absence requests, and many more. Delivered metrics include benefit contribution ratios, benefits value, base compensation ratio, and absence cost.

Learning and Development Mart

Assess the effectiveness of your learning and development initiatives using information about your workforce skills and competencies, training programs and performance. Do you have the right skills in the right place? Are your training programs having a positive effect on performance? Which individuals are your most skilled workers? The Learning and Development Marts helps answer these questions and more to help support your employees' professional growth by bringing in and analyzing information from HRMS applications such as PeopleSoft Enterprise Human Resources as well as Learning Management Systems (LMS) such as PeopleSoft's Learning Management.

Analytic content of the Learning and Development Data Mart has been expanded in the areas of accomplishments, licenses, degrees, competencies, learning objectives, ratings, scores, instructors, and several others. Expanded metrics include training expenses, training days/headcount, training cost/FTE, learning certification counts, performance self-ratings, and many others.

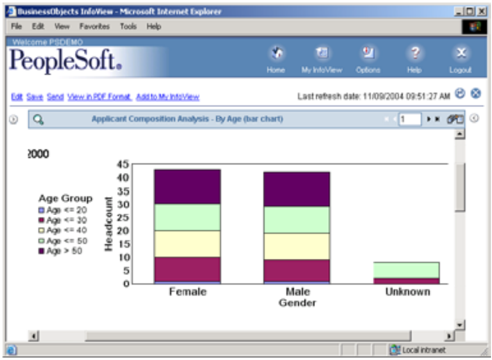
Information Access Tools

Your users require a diverse set of reporting and analysis capabilities as well as the ability to search for answers to unanticipated questions, and the ability to explore a set of values to find a trend. There isn't one single tool that will meet all of these needs. The HCM Warehouse supports a comprehensive reporting and analysis toolset that meets the complex needs of today's organizations including ad hoc querying, scorecarding, dashboards, multidimensional analysis, exploration, and formatted production style reporting capabilities.

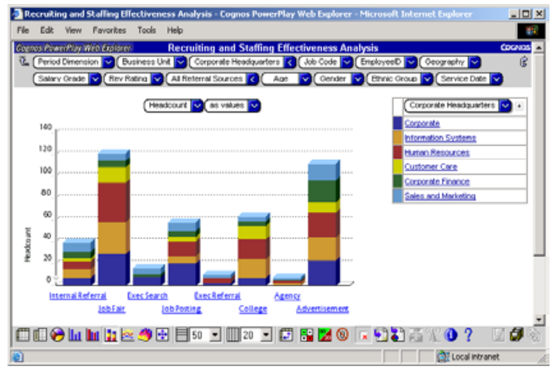
All world-class Business Intelligence tools including those from Cognos, Microstrategy, and Business Objects can access PeopleSoft's HCM Warehouse. These tools provide a full range of information access features including those needed for:

- Ad hoc queries and reports for non-technical users.
- Production reporting capabilities for Information Technology professionals.
- Statistical capabilities for planning and budgeting.
- Analytic capabilities for business analysts and management.
- Scorecarding and dashboards for everyone.

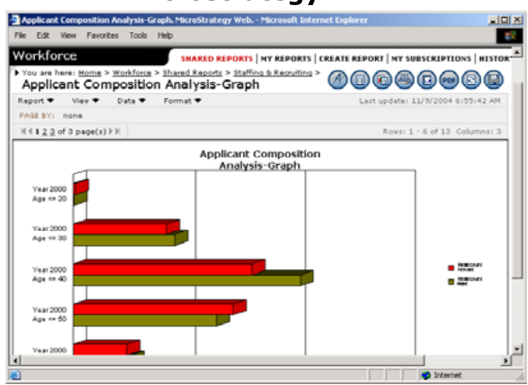
Business Objects



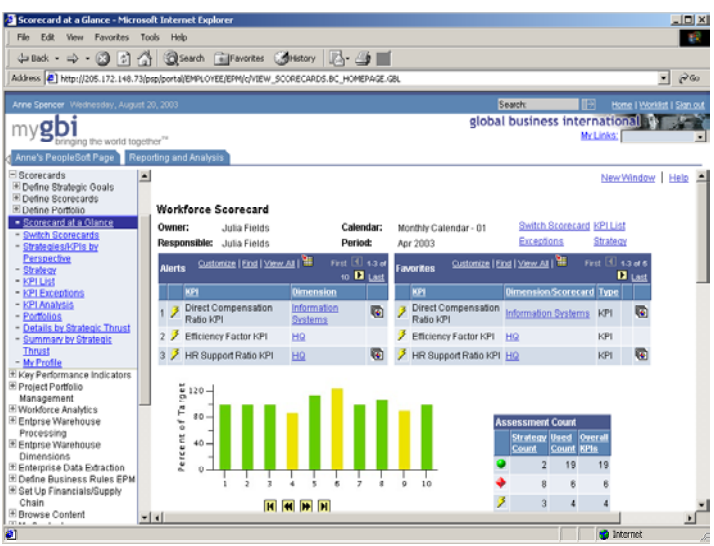
Cognos



Microstrategy



Information Access Tools: Sample Displays



Information Access Tools: Scorecarding

What's New in PeopleSoft Enterprise 8.9 to PeopleSoft EnterpriseOne Integrations?

Seamless business process integration is a need for all enterprise application vendors. We recognized that need within our own customer base after the merger of J.D. Edwards and PeopleSoft. That's why we're providing and maintaining integration between PeopleSoft Enterprise HRMS and PeopleSoft EnterpriseOne Financial Management and Manufacturing Management systems. This delivered integration eliminates the costs and resources associated with custom interfaces and decreases the total cost of ownership for our customers.

In HRMS 8.9, we're adding business process integration points with:

- PeopleSoft EnterpriseOne Address Book.
- PeopleSoft EnterpriseOne General Ledger.

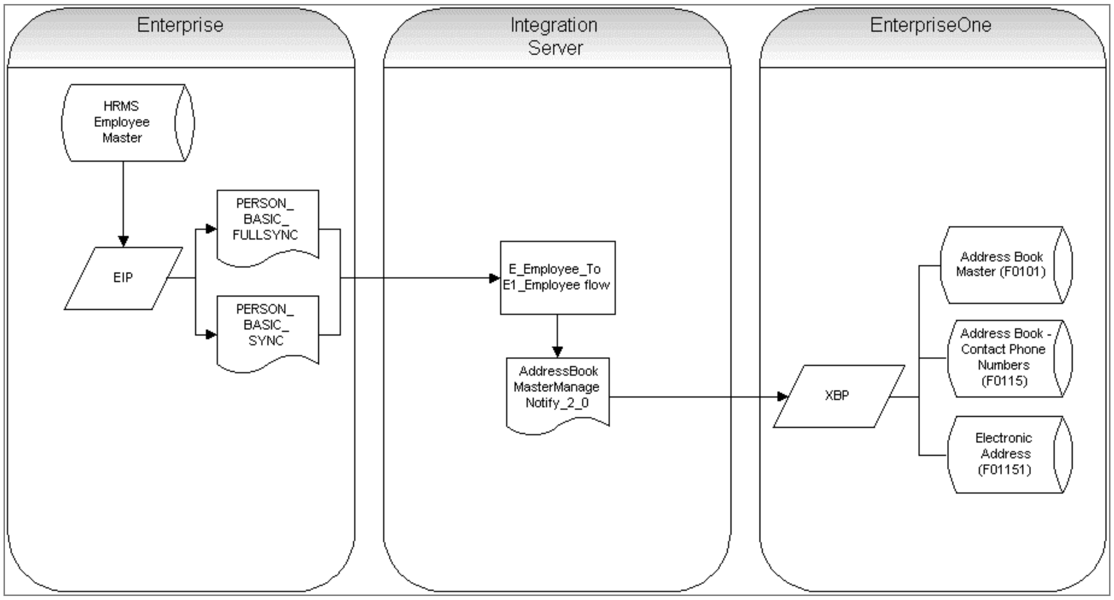
PeopleSoft EnterpriseOne Address Book

PeopleSoft Enterprise and PeopleSoft EnterpriseOne applications use employee information such as name, address, and phone number. This data must be maintained in both systems. By using our integration, you can copy your existing employee records from PeopleSoft Enterprise Employee Master to the PeopleSoft EnterpriseOne Address Book. This integration also automatically updates PeopleSoft EnterpriseOne each time that you add or change an employee record in PeopleSoft Enterprise.

The synchronization of employee and department data between PeopleSoft Enterprise HRMS and PeopleSoft EnterpriseOne eliminates the need to manually maintain both systems, thereby reducing data maintenance and errors.

This integration is useful if you are using one or more Enterprise systems, but you conduct other business functions involving employees in EnterpriseOne. For example, you might use a Enterprise payroll system, and the EnterpriseOne Expense Management system.

You can run this integration as a batch process to do an initial load of the data. You can also enable this integration to synchronize person information in real time when a new employee is added or information for an existing employee is changed.



PeopleSoft Enterprise HRMS to PeopleSoft EnterpriseOne Address Book Process Flow

PeopleSoft EnterpriseOne General Ledger

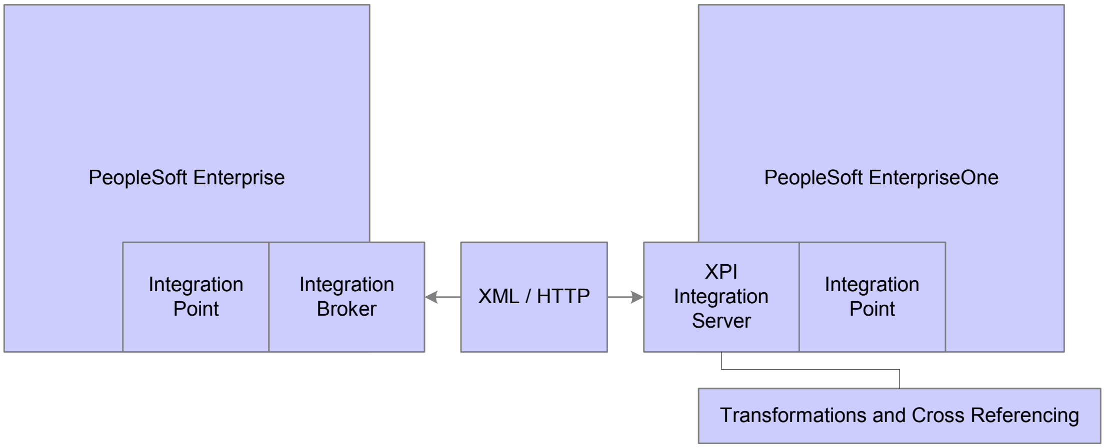
Posting payroll data to the general ledger is one of the final steps in the payroll cycle. When a combination of products exists within an enterprise, integration solutions can be costly and time consuming to implement and maintain.

PeopleSoft Enterprise Payroll with PeopleSoft EnterpriseOne General Ledger Integration provides synchronization between PeopleSoft Enterprise Payroll for North America or Global Payroll and PeopleSoft EnterpriseOne General Ledger. Business objects can be defined and maintained in a single system and synchronized, thereby reducing data entry errors and redundancy. Now, payroll transactions from PeopleSoft Enterprise payroll applications can be posted easily to PeopleSoft EnterpriseOne General Ledger.

Delivered as an off-cycle project for PeopleSoft 8.8SP1, PeopleSoft Enterprise payroll with PeopleSoft EnterpriseOne General Ledger Integration enables synchronization between PeopleSoft Enterprise Payroll for North America or PeopleSoft Enterprise Global Payroll and PeopleSoft EnterpriseOne General Ledger. Business objects are defined and maintained in a single system and synchronized, thereby reducing data entry errors and redundancy. Payroll transactions from PeopleSoft payroll applications are posted to PeopleSoft EnterpriseOne General Ledger.

The purpose of this integration is to translate the accounting entries generated by PeopleSoft Enterprise Global Payroll and PeopleSoft Enterprise Payroll for North America into journal entries that can be accepted and processed in PeopleSoft EnterpriseOne General Ledger.

The following diagram illustrates the architecture for the integration:



Integration architecture diagram

The major steps involved in the integration of Enterprise payroll applications with EnterpriseOne General Ledger are:

1. Set up the EnterpriseOne and Enterprise databases for the integration.
   a. Set up integration options and code cross-referencing in the EnterpriseOne XPI soft-coding/cross-reference database.
   b. Set up the Enterprise Integration Broker node and messages to subscribe to EnterpriseOne data and to publish payroll accounting lines.
2. Initially load, configure, and map data:
   a. Load EnterpriseOne data into Enterprise tables through Integration Points.
   b. Configure the target system and product to identify the specific general ledger product and version.
   c. Configure general ledger business units in Enterprise and map them to human resources (HR) business units.
   d. Map EnterpriseOne cost centers and accounts to Enterprise payroll data.
3. Incrementally synchronize changes in EnterpriseOne master data.
   a. Add, change, or delete actions performed on the master EnterpriseOne tables automatically trigger incremental synchronization integrations.
   b. When EnterpriseOne updates data in Enterprise tables by the incremental integration, Enterprise payroll users must update data configuration and mapping as needed.
4. Routinely post payroll data to general ledger.
   a. The Enterprise payroll application initiates synchronization of currency exchange rates if needed.
   b. The Enterprise payroll application processes and posts accounting lines to the EnterpriseOne staging table.

c. The EnterpriseOne GL application validates transactions and loads them into the Account Ledger table (F0911).

d. If necessary, data errors are corrected in the EnterpriseOne table or the payroll application resets GL processing, corrects errors, reprocesses, and reposts.

e. The EnterpriseOne GL application posts journal entries to the Account Balances table (F0902).

What's New in PeopleSoft Workforce Service Delivery: PeopleSoft Enterprise HelpDesk for Human Resources?

PeopleSoft provides the only integrated service management solution that enables companies to automate the entire process of managing internal HR support and service requests. In the past, organizations have been unable to provide a complete service delivery mechanism for their entire workforce, which has meant costly overlapping services at best or lengthy delays and inefficiency at worst. Self-service has significantly enhanced the overall ability of organizations to improve efficiency, reduce costs, and increase workforce satisfaction.

By augmenting self-service, HelpDesk for Human Resources is a complete integrated business solution for human capital management workforce service delivery. It quickly enables streamlined, integrated support processes within a single global framework. It enables you to leverage best practices throughout the organization—anywhere, anytime. Workforce efficiency is further enhanced by providing HR help desk agents and specialists with appropriate tools and information to resolve questions from the workforce as quickly as possible. By using real-time, 360-degree views, it aligns your workforce with key organizational goals by tying together an enterprise view of people, skills, performance, cost efficiencies, and HR services.

With release 8.9, we're extending your ability to support HR service operations through key enhancements in the following areas:

- Knowledge management.
- Service level agreement management and reporting.
- Employee self-service.
- Service analytics.
- System configurability.
- Multichannel communications.
- ERMS.
- Computer telephony integration (CTI).

By mid-2005, another release of HelpDesk for Human Resources will be made available to provide integration to the HRMS 8.9 database. In addition to these features highlighted in this section, the HelpDesk for Human Resources 2005 release will include expanded integration points to support the new Person Model, expanded integration points into additional HRMS functional areas, and new navigational features. Further information on these features will be provided in late 2004/early 2005.

Knowledge Management

In release 8.9, HelpDesk for Human Resources provides expanded knowledge management capabilities, which enable users to locate information quickly and conveniently. In addition to increasing the productivity of help desk agents, this solution greatly enhances the usability of the system for self-service users. We've extended the search capability in PeopleSoft Enterprise Solution Advisor to include:

- Thesaurus

  Users can search and select documents based on synonyms for a specified word.

- Alternate spelling

  The search engine performs approximate pattern matching and identifies similar words to help eliminate the impact of common misspellings or typing errors.

- Stop word

  Commonly used or repetitive words can be excluded from the search to narrow the search and reduce search times.

- Spider index

  The system can search indexed documents on a web server or in a file system to greatly expand the knowledge base that is available to users.

- Expanded advanced search

  Additional operators and modifiers are provided to enable users to perform more specific searches.

Service Level Agreement Management and Reporting

Service level agreements (SLAs) are vehicles for setting and managing expectations, improving service quality, and lowering the cost of providing HR support. HelpDesk for Human Resources 8.9 supports the management and reporting processes that are related to internal SLAs, which enable help desk organizations to better prioritize HR support requests and measure their ability to uphold internal service commitments.

The SLA management and reporting capability includes:

- The ability to define SLAs for use by HelpDesk for Human Resources.
- The ability to define different service levels (response-and-restore times) for different roles, departments, locations, contact channels (for example, web, phone, or in person), and incident priority.
- The ability to determine the appropriate response-and-restore time for an incident based on predetermined weighting of the applicable criteria mentioned earlier.

  The service level selection options can be presented to the agent or selected automatically.
- An SLA Smart View that provides users and management with real-time insight into performance against targeted service levels and related agreements.

  Smart Views enable more proactive management by allowing users to conduct interactive what-if analysis. The SLA Smart View enables multidimensional analysis of items such as on time and late response, and restore times across provider groups, individual agents, and priority.

Employee Self-Service

Employee self-service enables organizations to provide their workforce with more convenient support at a lower cost. We've extended the self-service capability to include:

- Out-of-the-box access to troubleshooting guides and frequently asked questions.
- Access to live-agent chat from any self-service page.
- Ability to automatically provide employees with a list of suggested solutions, based on the content of their request, while a chat request is in the queue.

These capabilities mean that HelpDesk for Human Resources 8.9 delivers support and issue resolution beyond the agent, right into the hands of the workforce. Employees can resolve most questions on their own with intelligent solutions, frequently asked question prompts, and the ability to access live-agent chat. Building on the most successful support desk toolsets, employees are prompted with solutions or focused search prompts to streamline solution delivery. Your entire workforce can get the right answer at the right time.

For more information on PeopleSoft's email management system (ERMS), chat capability, and the enhancements delivered in the current release, see the MultiChannel Communications section of the PeopleSoft Enterprise CRM Statement of Direction and Release Value Proposition.

Service Analytics

HelpDesk for Human Resources leverages PeopleSoft Prescriptive Analytics to introduce the concept of closed-loop analytic functions in internal HR support. This framework is used behind the scenes to guide HR specialist actions, enhance the value of customer interactions, and help enforce the adoption of best practices.

Embedded service analytics provide HR help desk agents with guidance on suggested next actions and related dialogs, with one-click access to the applicable application page or branch script. For example, if an employee contacts the help desk to correct information in his profile or W2, the help desk agent is automatically provided with links to the HR transactions that are required to resolve the case. HelpDesk for Human Resources ships with more than 50 of these most frequently used HR transactions.

Based on the case information and description, embedded service analytics provide suggested actions and one-click access to the related application page required to resolve the case.

System Configurability

In HelpDesk for Human Resources 8.9, we provide system administrators with more case page configurability options. These options increase flexibility while reducing total cost of ownership by eliminating the need to customize. Users can better configure HelpDesk for Human Resources to support internal business processes across lines of business, departments, or locations.

Options for case configuration include:

- Items such as hiding or displaying individual fields, sections, or tabs.
- Choices for field labels, toolbars, and search configuration.
- Choice of the associated toolbar and configurable case search definition.

MultiChannel Communications

Providing an end-to-end business process solution for HR service delivery is key to the success of any organization. Delivering this support across a variety of the most frequently used communications channels means greater flexibility, responsiveness, and faster point-in-time solutions. Callers can be on the road, log a problem, and specify the best way to contact them with the resolution. There’s no need to lock the communication of the solution to the communication channel in which it was received.

PeopleSoft helps organizations manage an integrated, multichannel HR contact center cost effectively. We also help agents deliver consistent yet highly personalized service—no matter the communication channel.

In release 8.9, we have further expanded the ERMS solution in the following areas:

- Incorporation of natural language processing (NLP) for smart business processes.
- Embedded intelligence for enhanced HR agent effectiveness.
- Redesigned email workspace for enhanced usability.

ERMS

Our email response management system (ERMS) includes natural language processing support, which enables further intelligent automation of email management. In this release, users can route, suggest, and respond automatically to an incoming email. They can tailor the process and level of automation based on the categorization of an email. For example, suggested responses to high-priority emails can be routed to a particular HR specialist for review and response within a required time frame.

Given the volume of calls for assistance that are initiated through email in many organizations, these tools provide instant value. Call routing via email means better matching of the caller to the most effective resource, shorter queues and wait times, and clear explanations of the timeframes within which a solution can be delivered. This additional integration is incorporated on top of existing email installations to further leverage existing IT investments.

In addition to focusing on system usability, we're further enhancing productivity by embedding additional intelligence into the email workspace. Specific enhancements include:

- Automatic creation of a case from an email, including prepopulation of all relevant information.
- Recommended next actions and suggested solutions based on the content of an email.
- Real-time visibility into recent employee interactions and activities, with the ability to drill into any interaction with one click.
- Enhanced automatic selection of email templates from expanded template indexing that includes email categorization, product group, individual product, or keywords.
- Association of internal notes to an email and inclusion in the employee's interaction history.

Based on the intelligent classification of an email and its content, the system automatically suggests templates for the HR specialist to use in crafting an accurate and consistent yet personalized response to an email inquiry.

Computer Telephony Integration (CTI)

Through our partnerships with leading CTI vendors, PeopleSoft delivers a unified desktop for HR specialists that streamlines system navigation and increases HR agent productivity. PeopleSoft exposes a server-side API that enables our partners to integrate directly through the PeopleSoft desktop. Agents have a seamless desktop interface across all employee communication methods and business applications, reducing clicks and providing a single desktop look and feel. The server-side integration enables customers to continue to leverage their investments with our partners' technology. They can monitor agent state and control the call queue without introducing another desktop tool for the HR agent. In addition, PeopleSoft defers support for specific ACDs or PBXs to our partners, which allows customers to use any of the numerous switches supported by our partners.

What's New in PeopleSoft Enterprise Global Payroll 8.9?

Managing payroll in one country or multiple payroll systems around the globe can be costly and ineffective. Global Payroll is an innovative payroll system that gives you control over all aspects of your payroll operations in a multinational environment.

The single rules-based engine and scaleable platform enable you to install and operate payrolls that fully comply with local requirements on a worldwide basis. You can process payrolls in both a centralized and decentralized environment.

In HRMS 8.9, we made significant enhancements to our Global Payroll core in the following areas:

- Ease of use.
- Extended functionality.
- Integration.
- Data volume.

Ease of Use

Global Payroll 8.9 includes features that make it easier for the payroll manager to manage and process payroll.

Off-Cycle Payroll Processing

Many possible business reasons can require organizations to pay their employees right away, outside the regular on-cycle payroll calendar. Examples include terminations and related termination payments, corrections of pay errors, and processing one-off bonus payments. The Global Payroll solution today supports off-cycle payroll processing. In this new version, we are making enhancements to make the process even more intuitive and user friendly.

In Global Payroll 8.9, off-cycle payroll processing provides payroll processing outside the normal on-cycle payroll processing window, including scenarios such as paying a new hire who was not included in the regular run, corrections for timesheet omissions, and pay errors. The user can launch an off-cycle process without creating additional calendars, and the on-cycle run is automatically suspended.

Users have the option of overriding a payee’s normal payment method—for example issuing a check to a payee who is normally paid through direct deposit; limiting the elements in the process list that are to be resolved; and overriding the values of supporting elements.

The new off-cycle processing functionality is useful for any organization, but especially for organizations that have higher attrition rates (such as hospitality, retail, and other services industries).

Global Payroll supports four types of off-cycle transactions:

- Manual payments.
- Corrections.
- Unscheduled payments.
- Advances.

Manual Payments

In Global Payroll 8.9, you can record manual payments to payees from an external source. This feature provides functionality to allow manually calculated and prepared checks to be entered, and accumulators and balances to be updated, in the payroll system database. In this manual process, the system does not calculate the earnings, deductions, or tax elements. Instead, it accepts the amounts used in the gross-to-net calculation of the manual check that is issued to the employee and updates the accumulators and balances accordingly. Batch validation checks to see if the calculated gross and net pay accumulator amounts match the manually entered gross and net pay amounts. If they match, you can finalize the process and subsequent payments can consider the manual balances in future calculations.

Examples of this feature include on-demand payments for terminating payees, incentive payments, and corrective adjustments paid from satellite offices.

Corrections

In Global Payroll 8.9, off-cycle corrections are based on retroactive processing just like the retroactive corrections that take place during on-cycle processing. The retroactive method used is dependent on the type of correction being processed. There are four types of corrections that can be processed:

- Normal Retro.
- Reversal – Normal Retro.
- Reversal – Replacement.
- Replacement.

The first two methods follow the retroactive method based on the trigger. The last two methods force the corrective retroactive method for processing.

This off-cycle functionality automatically creates new calendars for processing. If deltas exist and are to be forwarded, the new off-cycle calendars that are automatically generated receive the deltas.

Unscheduled Payments

In Global Payroll 8.9, you can process one-time payments, such as a special bonus or expense reimbursement, that fall outside of the on-cycle process and for which calendars would not ordinarily be defined.

When entering instructions for an unscheduled payment, you can click a link to access the Positive Input page where you can enter positive input for a target calendar. The system automatically generates a target calendar based on the target period ID.

Advances

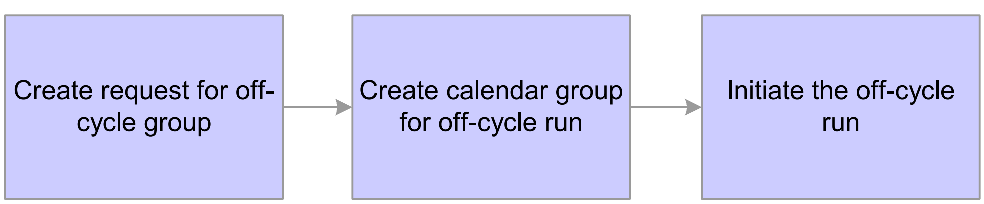
In Global Payroll 8.9, you can process advance payments made to payees before they are normally scheduled for payment. For advances, calendar groups are processed with the applicable calendars and batch processing follows the same logic as on-cycle calendars.

To issue a payment for a partial period, you enter the begin and end dates for the period to be paid. During subsequent processing, the system prevents payees from receiving duplicate payments for the same dates.

New Component for Entering Off-Cycle Instructions

A new Off Cycle Requests component is available for entering detailed instructions for off-cycle transactions. You'll use this component, plus the existing Calendar Group component and Calculate Absence and Payroll component to process off-cycle transactions.

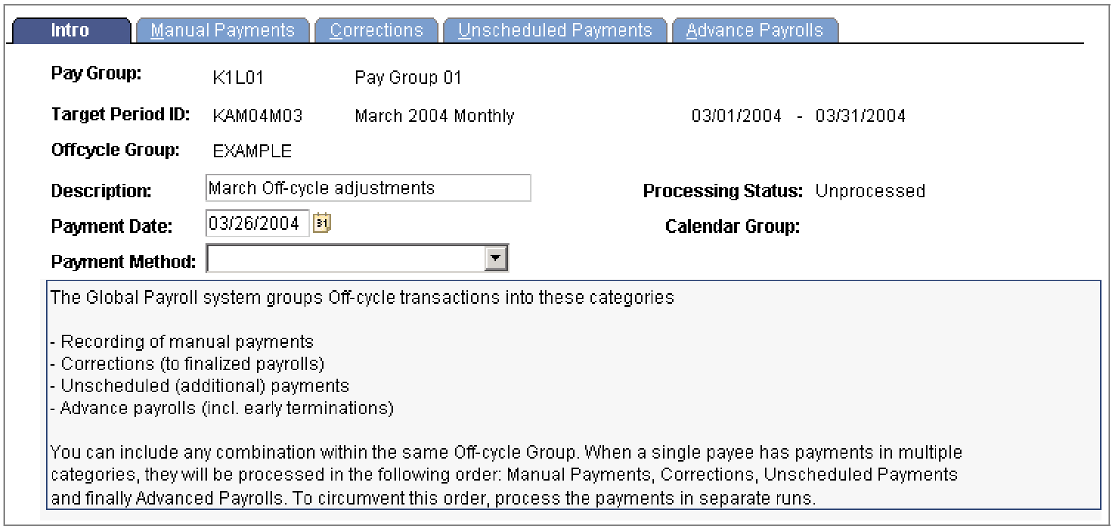
This diagram depicts the off-cycle steps:



Steps for processing off-cycle transactions

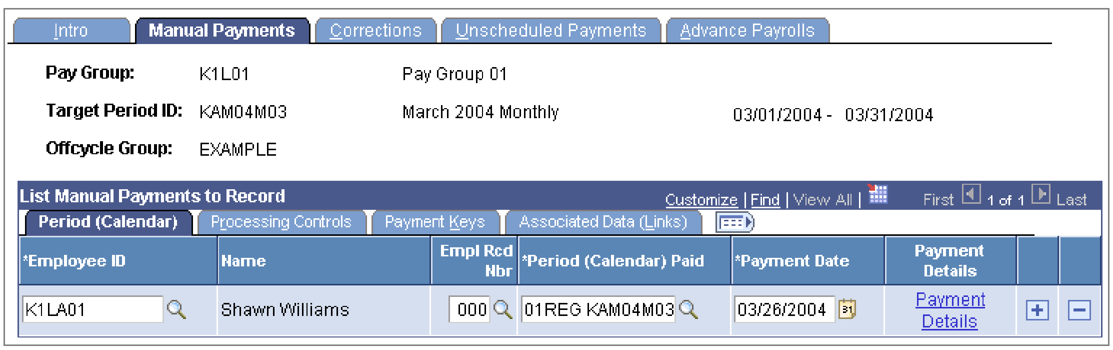
The request for the off-cycle group is similar to a calendar in an on-cycle run, except that it includes specific instructions for each payee to be processed. With the Off Cycle Requests component, you can enter multiple off-cycle requests for the same paygroup and target period.

On the Intro page, you define default instructions for all the off-cycle transactions you are processing.



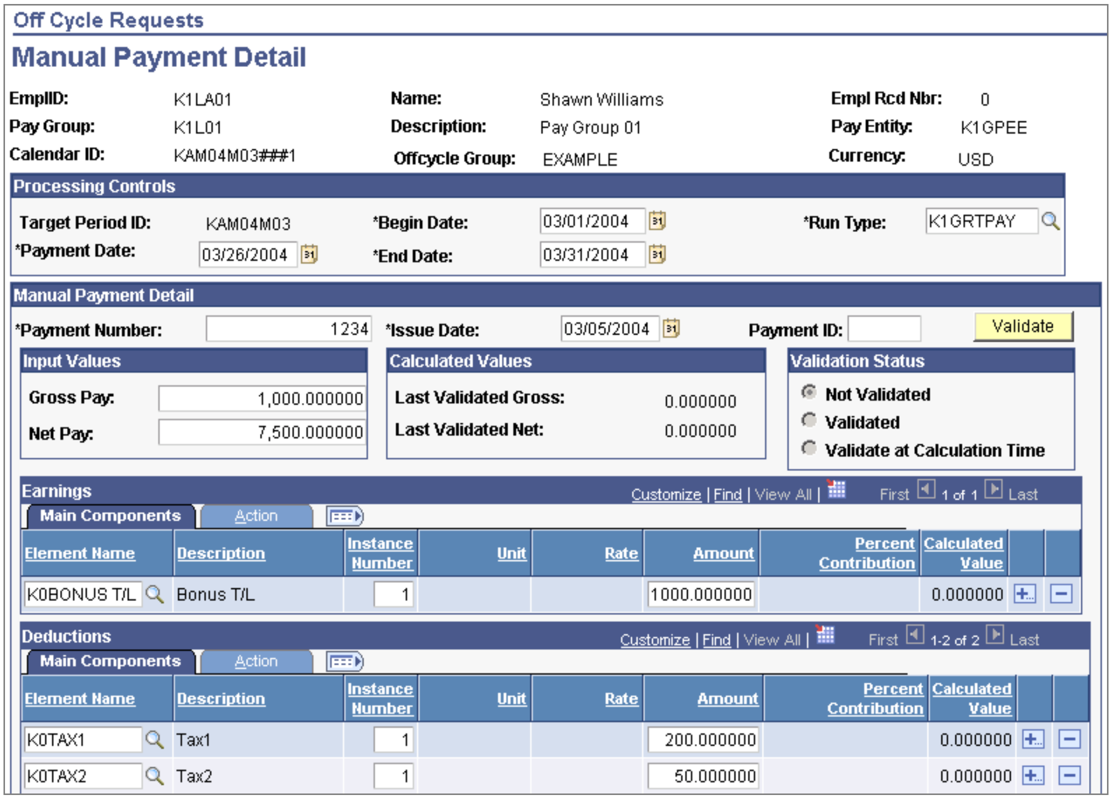
Entering default instructions for the off-cycle transactions

On the other pages of the component, you enter transaction-specific instructions. For example, to record a manual payment that was made to Shawn Williams you use the Manual Payments page.



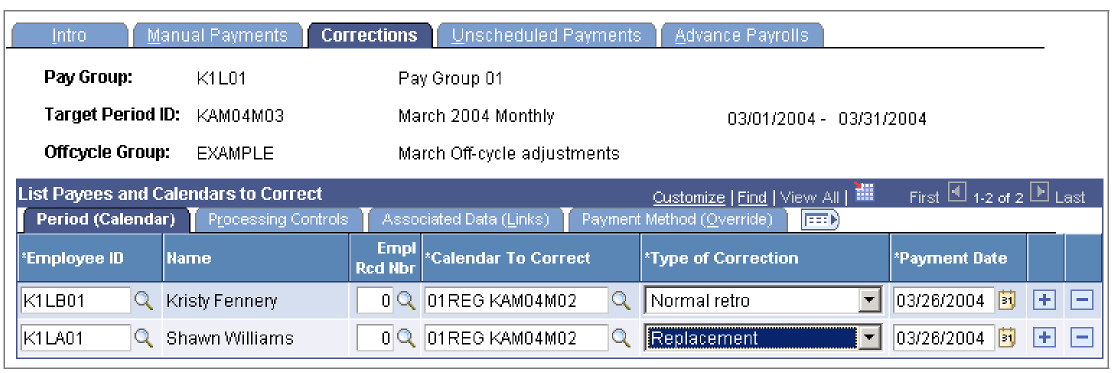
Entering instructions for an off-cycle manual payment

The Payment Details link on the Manual Payments page takes you to the Manual Payment Detail page where you record the payment number, gross and net amounts and other details.



Entering payment details for an off-cycle manual payment

To enter instructions for off-cycle corrections, you complete the Corrections page.



Entering instructions for off-cycle corrections

Administrator View of Payroll Results

In Global Payroll 8.9, we deliver the ability to configure and view user-defined payroll results online. Application definitions, list sets, and role-based settings on the Define Administrator Results component all contribute to the user-defined view of the Administrator Results component.

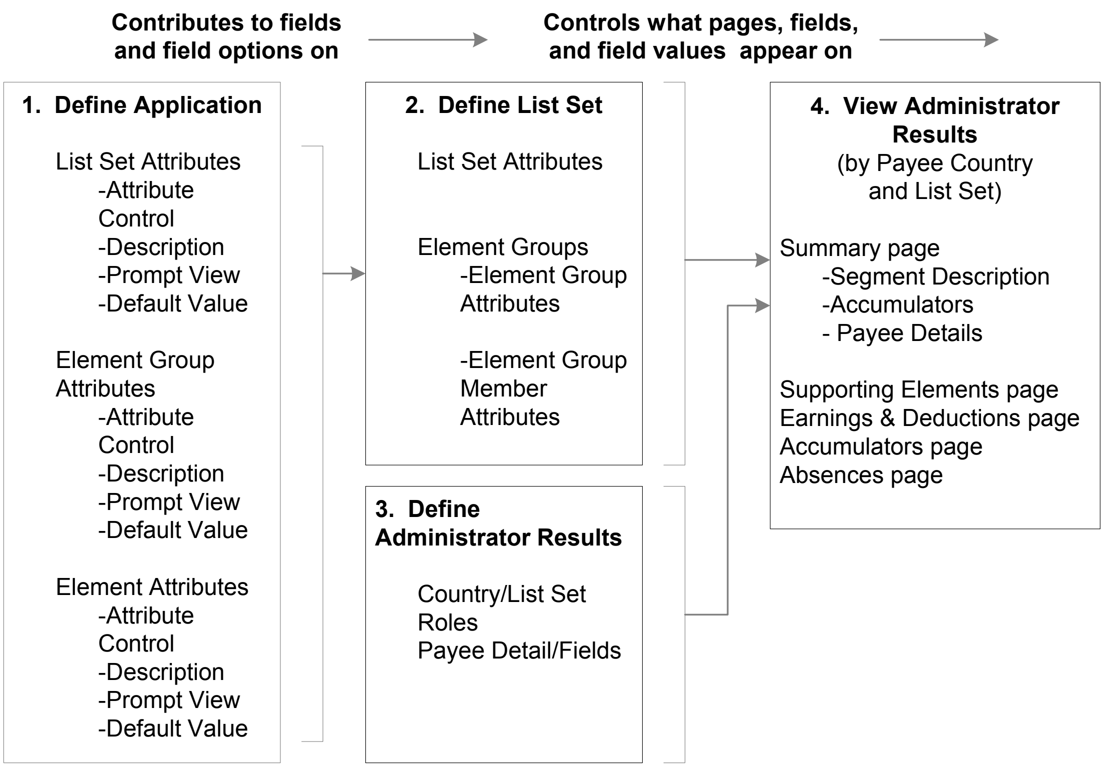
In summary, Administrator Results inquiry pages are used for viewing payroll results. They provide the ability to view the following types of information for a payee after a payroll has been calculated:

- Summary information detailing payee and segment information as well as gross to net pay accumulators.
- Supporting elements used in the payroll calculation such as variables and accumulators.
- Earning and deduction elements.
- Accumulators.
- Absence.

Now, you can create different inquiry views in the system for different administrators. For example, the benefits administrator may need to view specific benefit deduction information for functional auditing and reporting, whereas another user may not.

These configurable views enhance the efficiency of payroll users because users can access the payroll results data in ways that meet a unique business requirement. Users have access to all of the key payroll data (such as earnings and deductions, accumulators, absences, and supporting elements) in a single location.

The following diagram illustrates this user-defined relationship:



Configuring the appearance of the Administrator Results component

List sets and a delivered application definition (RSLT_ADM) maintain the framework for the appearance of the Administrator Results component.

First, the application definition is used to assign attributes to list sets and element groups.

Next, list sets are used to determine which elements appear on the page (through element groups defined for the set).

Finally, roles are assigned to the Define Administrator Results component for each list set, thereby completing the loop of configuration settings. All of these attributes work together to control the appearance of the Administrator Results component for each user.

Configurable Element Overrides

The configurable element overrides feature enables users to configure the supporting element override fields on the detail pages for both earnings and deductions assignments and positive input entries.

Specifically, Global Payroll enables you to configure the following delivered components:

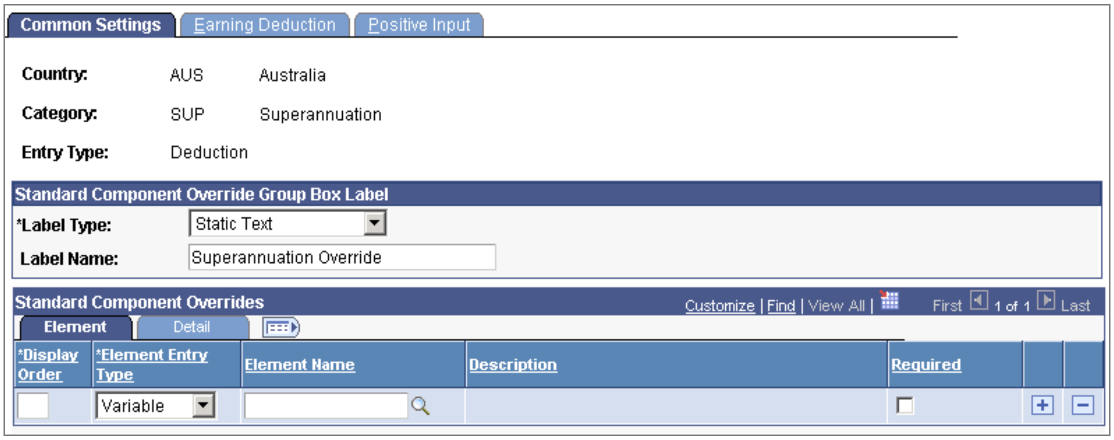
- Element Details page (accessible via the Element Assignment By Payee component and the Payee Assignments By Element component, commonly known as the "earning/deduction assignment" pages).
- Calendar ID Override Details page (accessible via the Positive Input By Payee component and the Positive Input By Calendar component).

You can use the pages on these components as delivered, or:

- Modify them by changing the labels, prompt tables, translate values, and yes/no values to better suit the element you want to override.
- Create an entirely new alternate component (using PeopleTools Application Designer) to replace the Element Detail page for the elements you specify. This gives you additional flexibility to define fields, page labels, prompts, and other page elements.

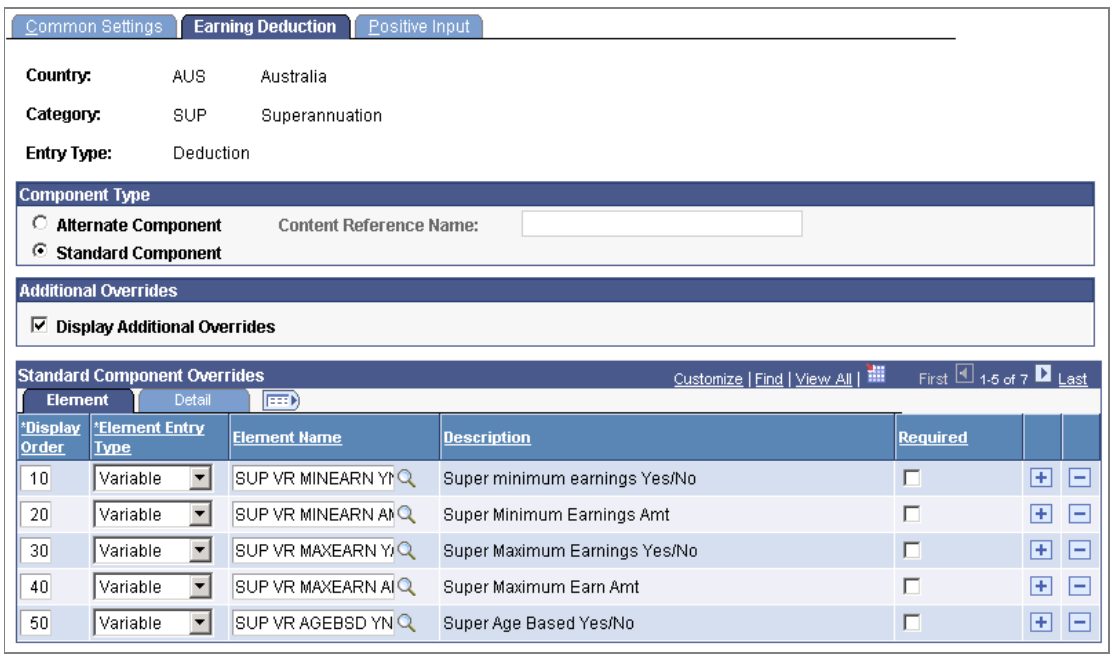
Component modifications and alternate components can be defined through the new Configuration By Element and Configuration by Category components. Both components perform the same, however, the Configuration by Category component enables you to assign specifications to multiple elements at one time.

Through the new Common Settings page, you can specify changes that apply equally to both the Element Detail page and the Calendar Override Details page.



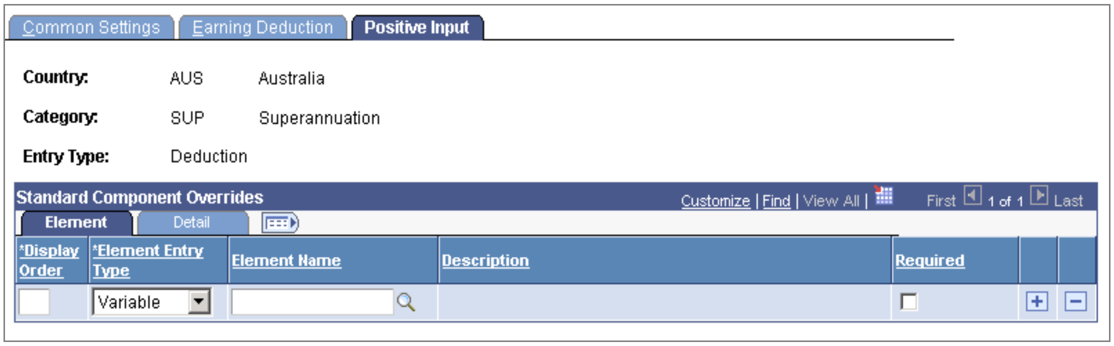
Assigning modifications common to both earnings/deductions and positive input

The new Earning Deduction page is where you indicate unique changes to the Element Detail page, or replace the Element Detail page altogether with an alternate component.



Assigning modifications unique to earnings and deductions

Finally, on the Positive Input page, you indicate unique changes to the Calendar ID Override Details page.

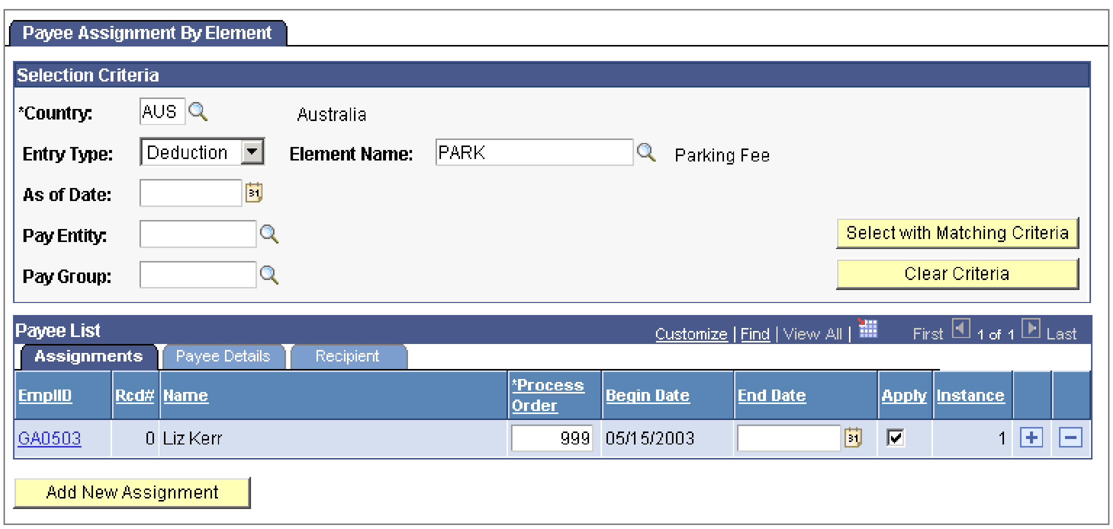


Assigning modifications unique to positive input

Earnings and Deductions Assignments

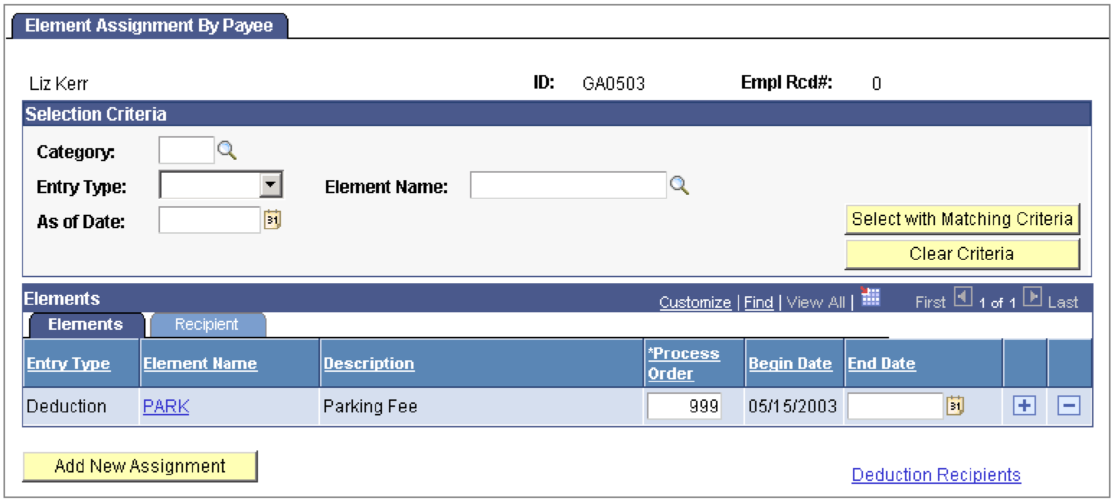
There are changes to the Earning/Deduction Assignments component. There are now two components through which you can enter earnings and deductions assignments:

- Payee Assignment By Element



Reviewing and assigning earnings and deductions by element

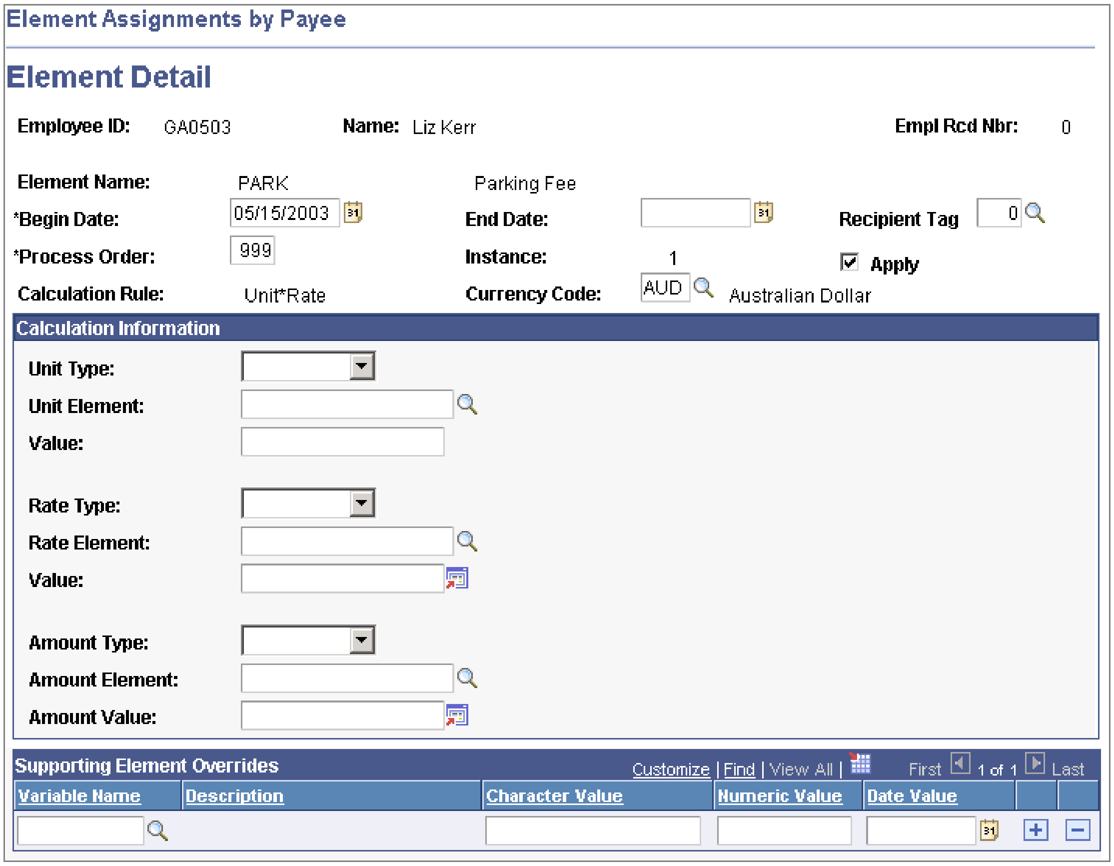
- Element Assignment By Payee



Reviewing and assigning earnings and deductions by payee

The display of these pages includes an enhanced user interface that presents information in a more inclusive and user-friendly format. Additionally, when the user clicks the Details link for an override element, they can access the user configurable Element Detail page, or a user configurable component of the user's own design, depending on the setup for the element.

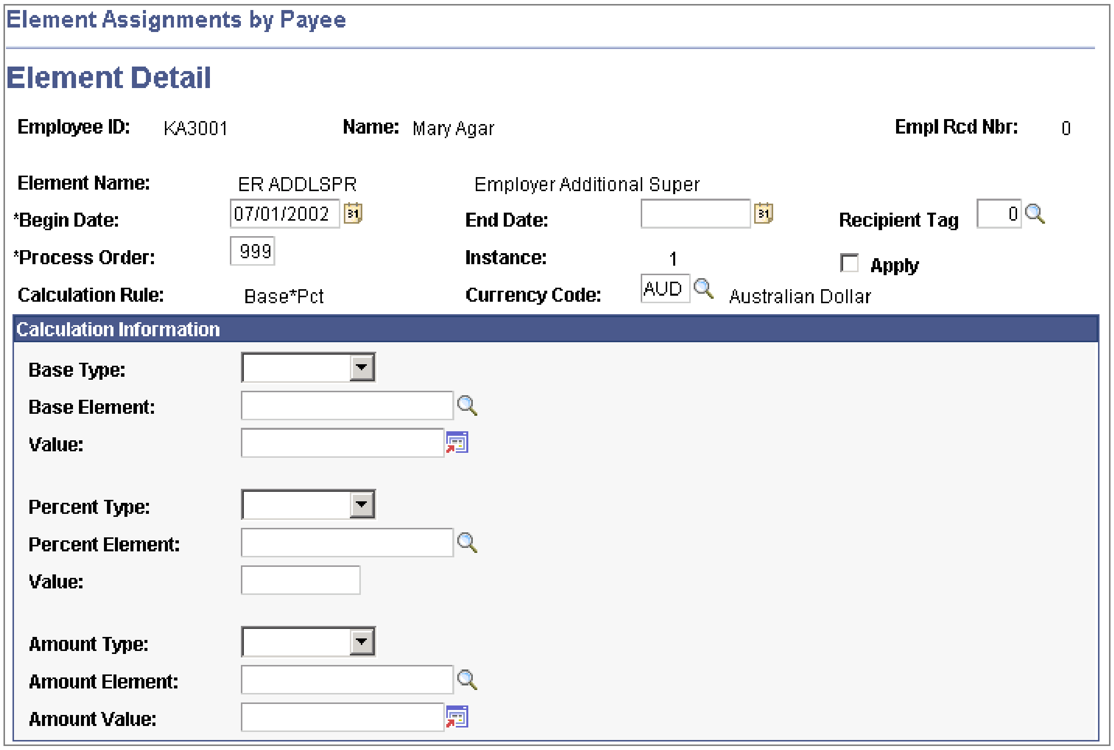
If the user accesses the Element Detail page, they may see the page as delivered.



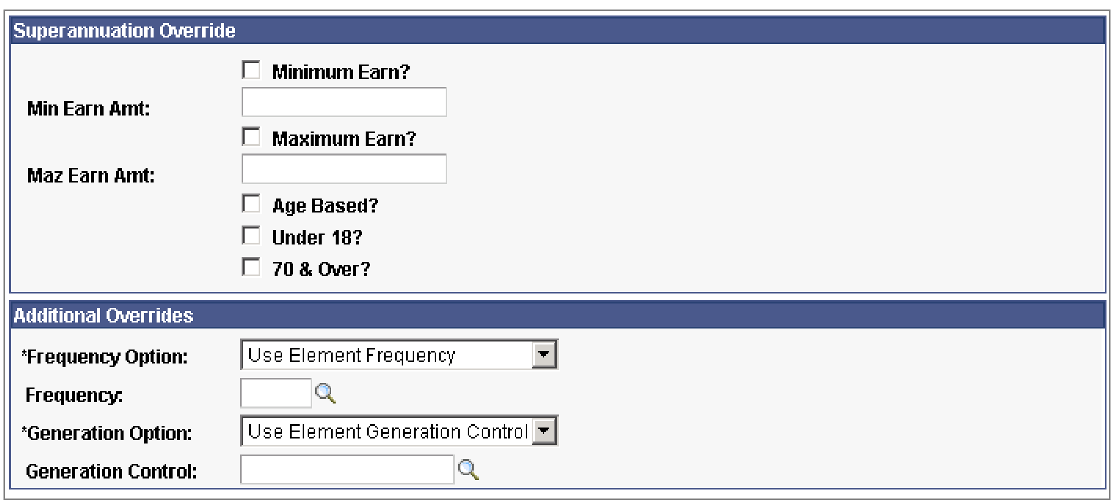
Viewing a delivered component (1 of 2)

Viewing a delivered component (2 of 2)

Alternatively, if the element has a defined configurable override, they will see an override group box with user defined group box labels, prompts, and displays.



Viewing a modified component (1 of 2)



Viewing a modified component (2 of 2)

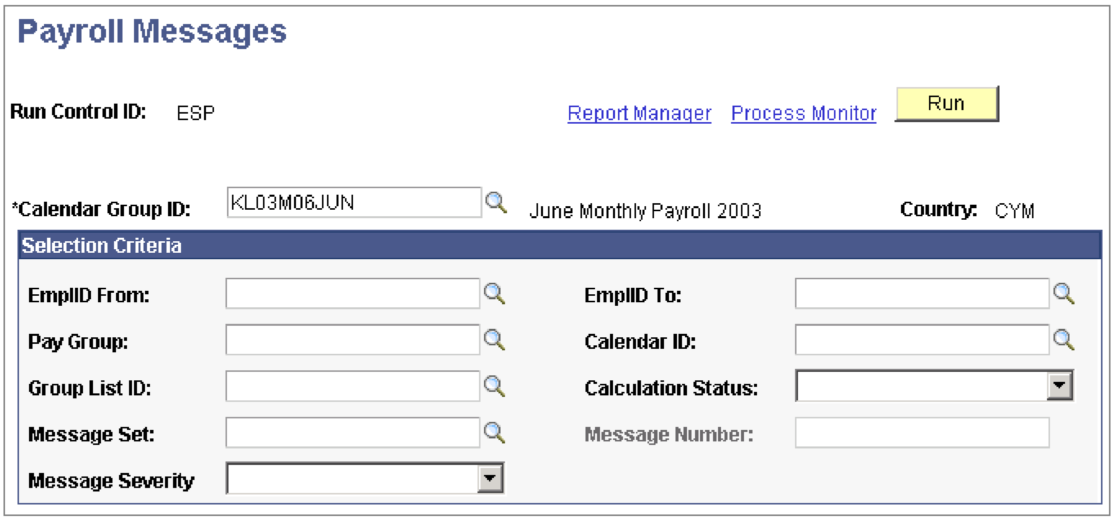
Positive Input Entries

Similar to earnings and deductions, through element override detail links on the Positive Input By Payee page and the Positive Input By Calendar page, users now access a page that is user configurable, enhancing data entry usability. The Supporting Element Overrides group box on the Calendar ID Override Details page can be modified to include element-specific group box labels, prompts, and displays.

Delivered Report for Payee Messages

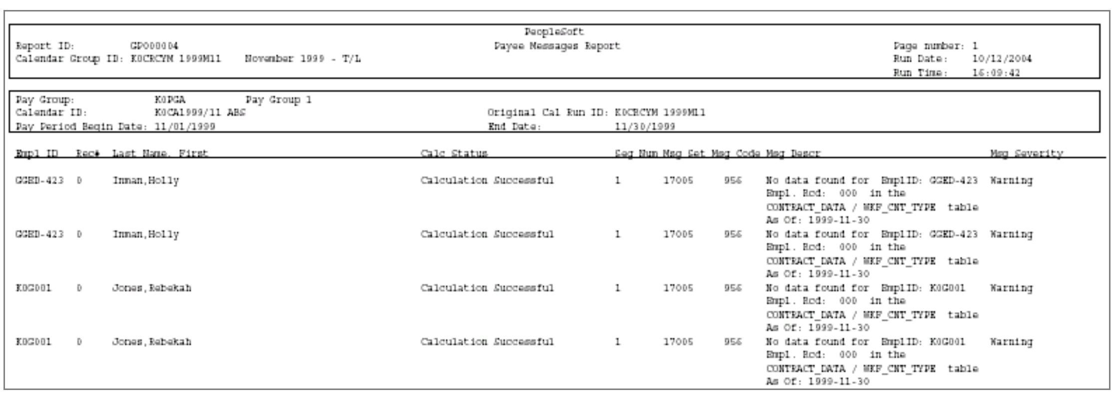
In Global Payroll 8.9, we deliver a standard global Payee Messages SQR (GP000004) report that enables payroll administrators to print out a list of messages that are created during the payroll process for a selected population. This report provides the ability to identify payees who may need further editing to make it through finalization of the payroll. It provides the same selection logic as is available online. You can access this page through standard menu navigation, or you can access it through the Go To Print Report link on the Payee Messages page.

Using specific selection criteria for a calendar group, the Payee Messages report is processed through the Payroll Messages page.



Running the Payee Messages report

A sample report appears as follows:



PeopleSoft
Payee Messages Report

Report ID: GP000004
Calendar Group ID: K0CRCYM 1999M11 November 1999 - T/L
Page number: 1
Run Date: 10/12/2004
Run Time: 16:09:42

Pay Group: K0PGA Pay Group 1
Calendar ID: K0CA1999/11 ABS
Original Cal Run ID: K0CRCYM 1999M11
Pay Period Begin Date: 11/01/1999
End Date: 11/30/1999

Empl ID	Rec#	Last Name, First	Calc Status	Seg Num	Msg Set	Msg Code	Msg Descr	Msg Severity
GGED-423	0	Inman,Holly	Calculation Successful	1	17005	956	No data found for EmplID: GGED-423 Empl. Rcd: 000 in the CONTRACT_DATA / WKF_CNT_TYPE table As Of: 1999-11-30	Warning
GGED-423	0	Inman,Holly	Calculation Successful	1	17005	956	No data found for EmplID: GGED-423 Empl. Rcd: 000 in the CONTRACT_DATA / WKF_CNT_TYPE table As Of: 1999-11-30	Warning
K0G001	0	Jones,Rebekah	Calculation Successful	1	17005	956	No data found for EmplID: K0G001 Empl. Rcd: 000 in the CONTRACT_DATA / WKF_CNT_TYPE table As Of: 1999-11-30	Warning
K0G001	0	Jones,Rebekah	Calculation Successful	1	17005	956	No data found for EmplID: K0G001 Empl. Rcd: 000 in the CONTRACT_DATA / WKF_CNT_TYPE table As Of: 1999-11-30	Warning

Sample of the Payee Messages report

Extended Functionality

Global Payroll 8.9 includes a variety of new features, as well as enhancements to existing features.

Multiple Resolutions for Earnings, Deductions

In some cases, you may need to calculate a given earning or deduction multiple times based on particular criteria. For example, you may need to resolve a loan repayment deduction multiple times in a single period, and track each repayment separately, if a payee has more than one loan.

In previous releases, you could trigger multiple resolutions of an earning or deduction by:

- Slicing or segmenting the element (using element or period segmentation).

  When you segment elements using period or element segmentation, Global Payroll resolves the elements multiple times.

- Entering positive input for an earning or deduction element using an Action Type of *Additional*, *Override*, or *Resolve to Zero*.

  When you enter *additional* positive input for an element, the element resolves once using the element's rule definition—or if there are element overrides, using the override values. The element resolves again using the values associated with the add-type instance of positive input.

  When you enter multiple positive input *overrides*, the system resolves them separately, using instance numbers to cause multiple resolutions of the earning or deduction.

With Global Payroll 8.9, you can also cause an element to resolve multiple times in a single period by:

- Assigning multiple instances of an element to a payee on the element assignment pages.

  For example, you could assign a garnishment multiple times in the same periods or segments for different amounts. The system assigns an instance number to each garnishment entry and processes each one separately.

  You can designate a different recipient for each garnishment by associating each garnishment instance with a unique recipient tag. You can do this for any type of deduction that is resolved multiple times and has multiple recipients.

- Defining an accumulator *driver* to cause multiple resolutions of an earning or deduction.

For each instance of the accumulator, there is a corresponding resolution of the earning or deduction that it drives. For example, you can define an accumulator to hold state taxable gross, use the value of *State* as an accumulator key, and use this accumulator to *drive* a state tax deduction element. When the system processes the tax deduction, and sees that there is a gross accumulator amount for states A and B, it processes the tax deduction once for each state, based on the amount in the corresponding state taxable gross accumulator.

Using the new mechanisms for triggering multiple resolutions, you can simplify the definition, maintenance, and processing of complex earnings and deductions that require multiple calculations.

Priority Order Processing of Net Pay Validation

When using net pay validation (NPV), you can now specify a priority order for taking deductions when net pay won't cover all deductions. Previously, only processing order was available.

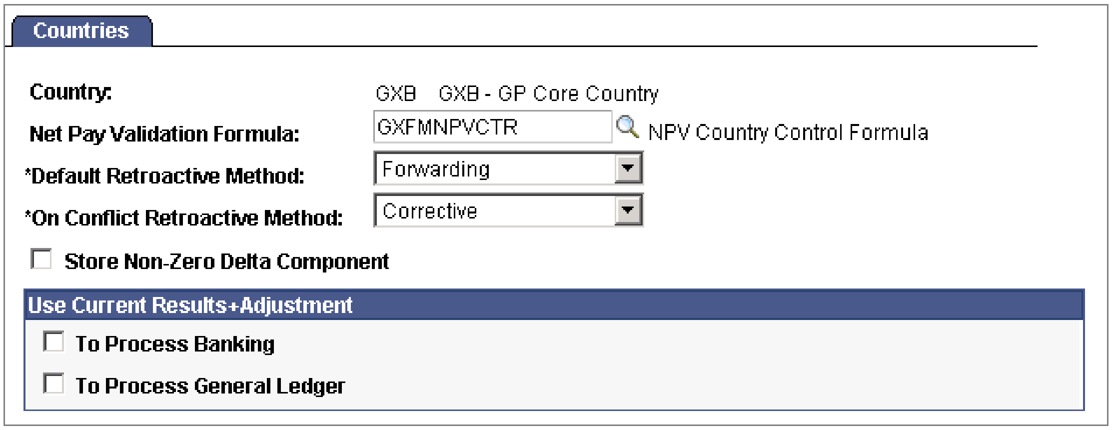
Process order refers to the order in which deductions are encountered in a section during processing, as determined by each deduction's assigned sequence number. Process order makes it possible to specify that pretax deductions be calculated before taxes, thus resulting in the tax liability, after which post-tax deductions are calculated. The system performs net pay validation each time it calculates a deduction.

Priority order, which is new, refers to a relative priority number that you can assign to each deduction. After calculating all deductions according to process order, net pay validation occurs in the order of each deduction's priority. This new feature is useful when a deduction's priority order differs from its process order. For example, NPV by process order is appropriate when it's more important to cover a garnishment that's processed after taxes, than it is to cover a pre-tax deduction.

A new feature allows you to set a minimum net pay amount for NPV processing. This capability is important in cases in which the payment to payee cannot be less than a specified amount or less than zero.

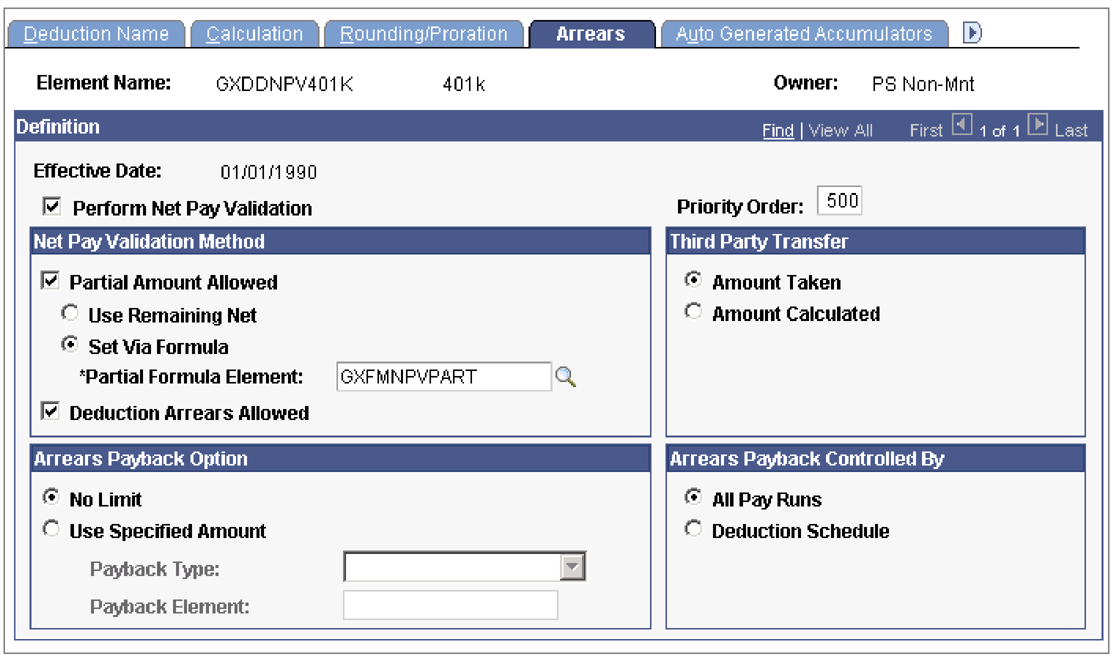
Fields used by the priority order feature now appear on three setup pages.

First, we added a Net Pay Validation Formula field to the Countries page. This is to be populated by every country that intends on using the Net Pay Validation by Priority check box on a sub-process (on the Sections – Definition page).



Assigning a net pay validation formula for a country on the Countries page

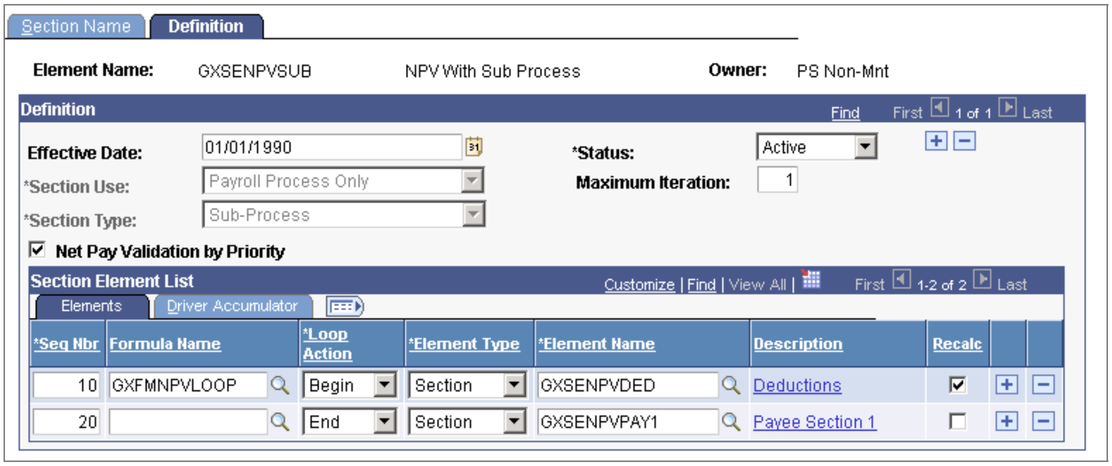
Second, we added a Priority Order field to the Arrears page. Deductions with the highest Priority Order number are processed first for net pay validation purposes.



Specifying priority order for a deduction on the Deduction – Arrears page

Finally, to ensure that payee sections are added to sub-process sections, both online and in batch, standard sub-process looping logic is used.

To indicate a net pay validation sub-process, a check box (relevant for sub-processes only) has been added to the Sections - Definition page.



Including deductions in a sub-process section on the Sections – Definition page

Post-Process Formula

The Global Payroll core engine currently enables you to override the resolved value of an earning or deduction by using a post-process formula, which is often done to apply limits or add additional amounts.

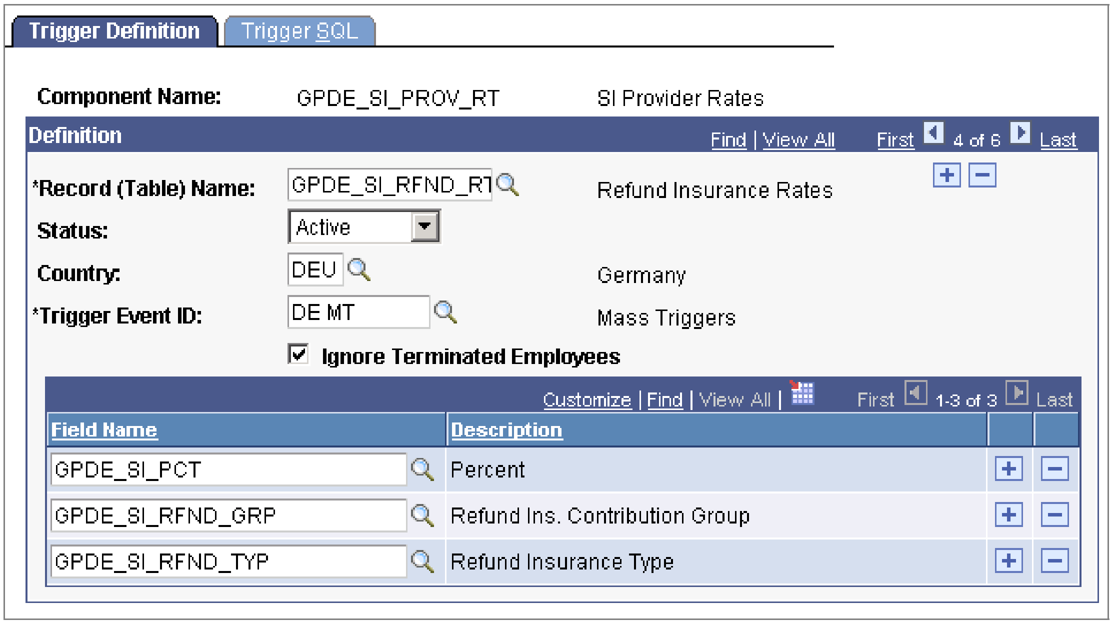
The previous functionality enabled you only to override the resolved amount. It did not enable you to override the individual component values (rate, unit, base, percentage). As a result, the calculation results are often misleading, and you end up with situations in which the component value results are not synchronized with the final resolved amount value.

This new functionality allows a functional user to be able to override each individual component (rate, unit, base, percentage) in a post-process formula, which provides a full solution to limit and additional amount requirements.

Note. The technique for rule developers to override the resolved amount of an earnings or deduction in a post-process formula has changed in this release. The overridden amount is no longer assigned to the post-process formula directly, but rather to a new override amount system element.

Mass Triggers

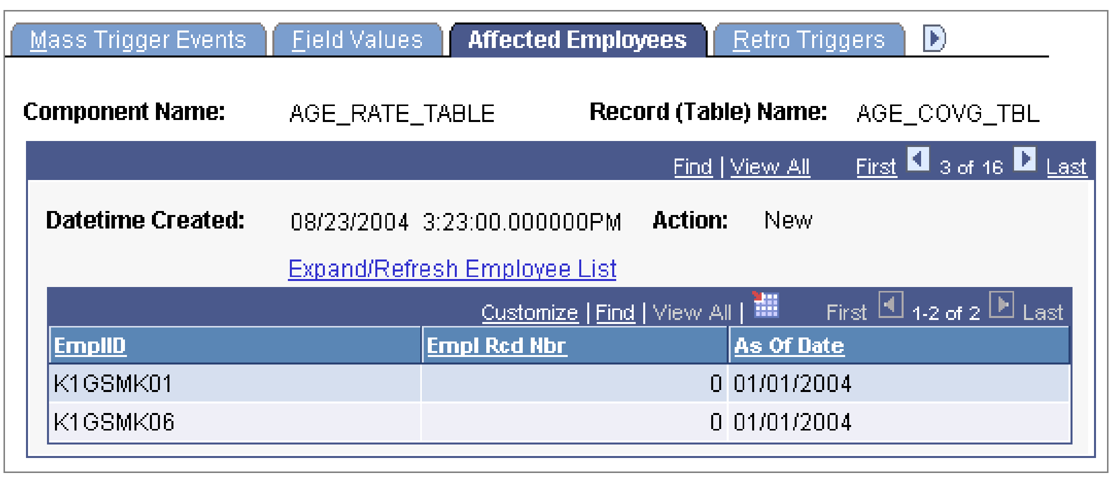
Global Payroll core now provides the ability to automatically create employee triggers based on changes to setup tables. You define the fields, records, and components that will activate the trigger by creating a Trigger Definition.



Create a trigger definition for a specific record.

You can then set up the SQL code that will check the records and determine the population affected by the Trigger Definition.

Once the trigger has been activated, you can view the trigger details, such as time of creation and affected employees, before accepting or deleting the changes.



View affected employees before accepting any changes.

After you have accepted the changes, the system generates a list of the resulting retroactive and iterative triggers that will be processed.

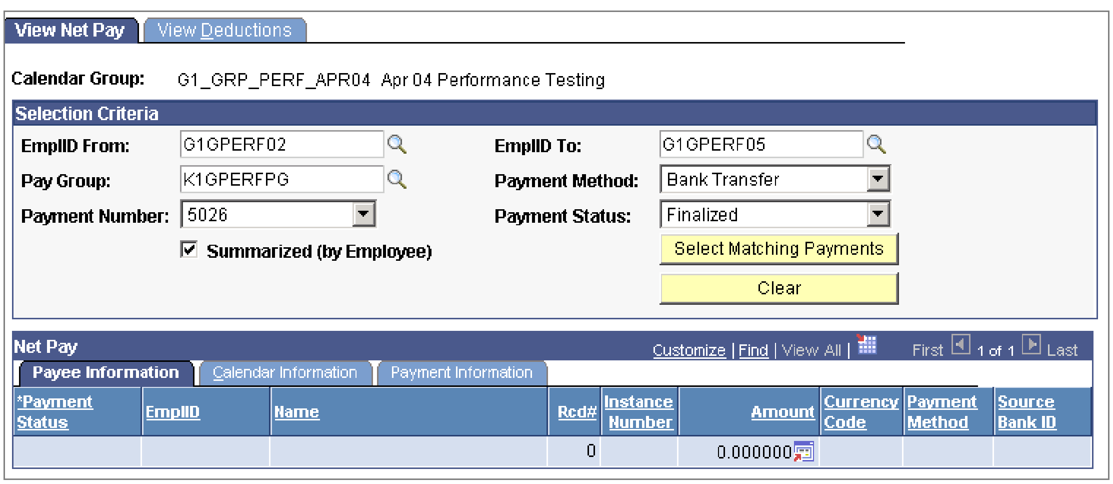
Banking Enhancements

The Global Payroll core banking process incorporates setup tables and batch processing, which creates generic payment information. Country extensions build processes that facilitate the transmitting of these records to banking institutions. Global Payroll 8.9 provides additional features that:

- Limit the payment method of check and cash to one of each for net pay distribution. Distributions can be designated by the employee to a bank transfer, postal order, wire transfer, check or cash, but you can only have one distribution in the form of a check and one in cash.
- Provide the ability to override the payment method for employees’ net distribution for a specific run type or calendar group ID or by payee.
- Provide the ability to put a net or recipient payment on hold and pay it at a later date.
- Distribute net pay based on calendar period and segmentation. Net pay is posted with a segment attached, and distribution is based on calendar group ID, employee ID, employee record number, run type, calendar period ID, and source bank ID.
- Allows for the ability to void a payment online.

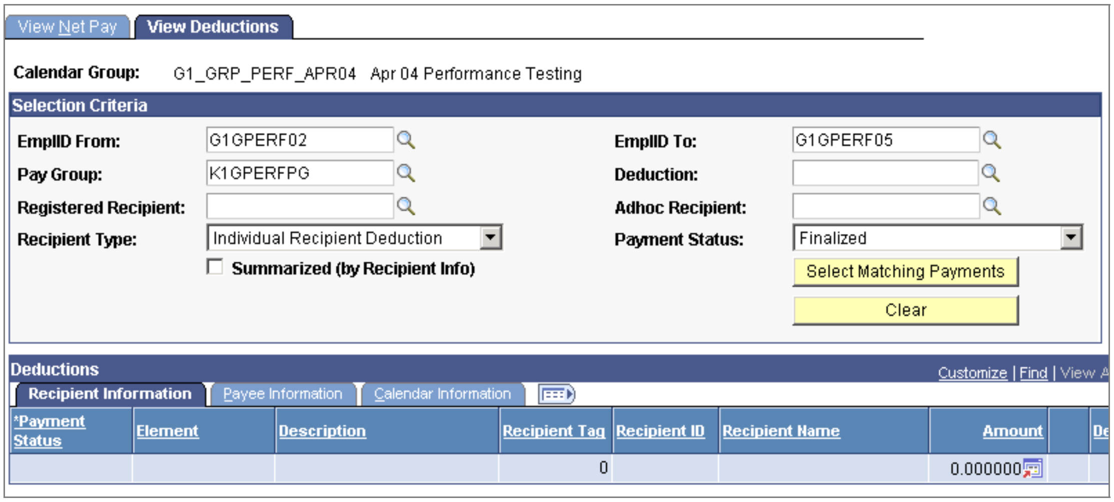
The Review Payments by Cal Group component has been revised in Global Payroll 8.9.

The View Net Pay page allows you to view payee net pay by calendar group. You can now provide the payment number for net pay. You can also hit the Select Matching Payments button to populate information in the Net Pay group box about payments that match the criteria you have defined.



View Net Pay page

The View Deductions page allows you to view deductions for recipients, by calendar group. You can now indicate whether you want to view deductions for either individual or general recipients on the same page.



View Deductions page

IBAN Support

International Bank Account Number (IBAN) is a bank account number, assigned according to international ISO standards, that uniquely identifies a bank account in cross-border financial transactions between European countries. The IBAN code contains information on the country, bank or branch ID, and account number.

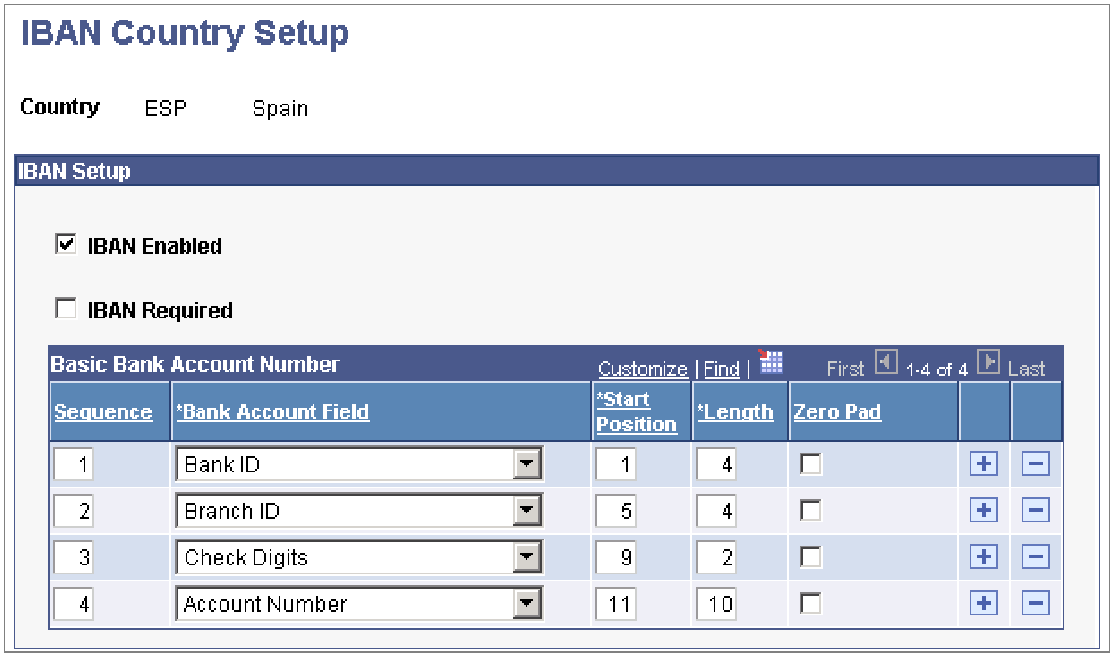
On paper, the IBAN is broken into groups of four characters to make it easier to read. The IBAN has the following format.

- ISO country code (such as CH): two characters.
- IBAN check digits: two characters.
- Domestic bank account code (BBAN): up to 30 characters.

In HRMS 8.9, the IBAN information is part of the employer and payee bank account information and the electronic file transfer (EFT) files use this code where needed:

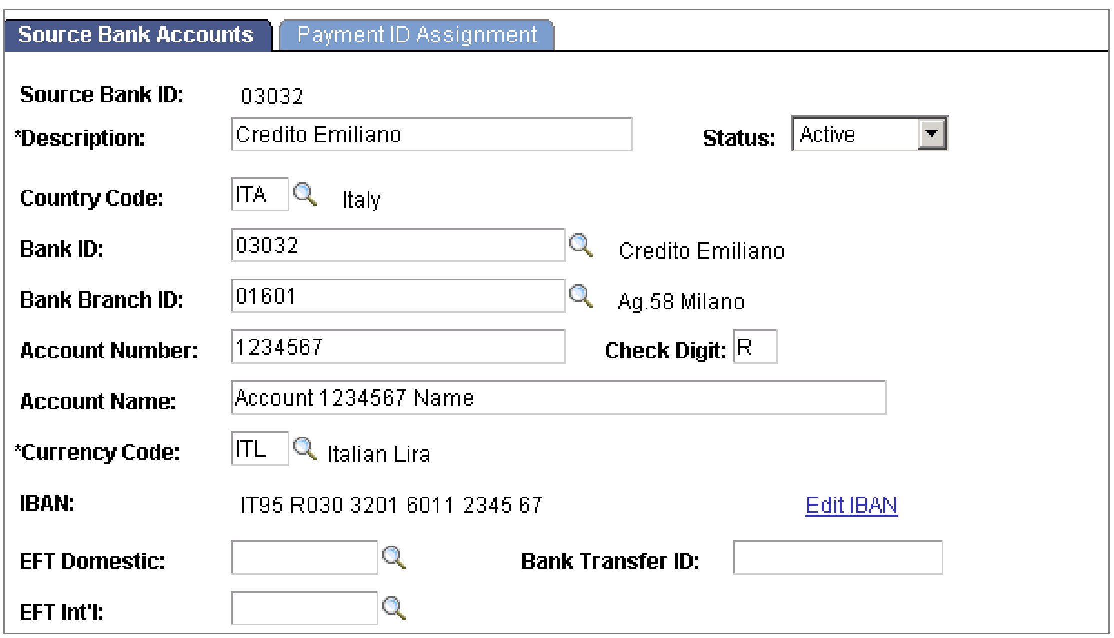
- The BIC code (also known as SWIFT code) has been added into the Bank and Branch definitions.
- The IBAN field has been added into the Bank Accounts definitions.
- The Global Payroll country extensions for Spain and Switzerland update their EFT processes to support IBAN.

To set up IBAN, use the IBAN Country Setup page:



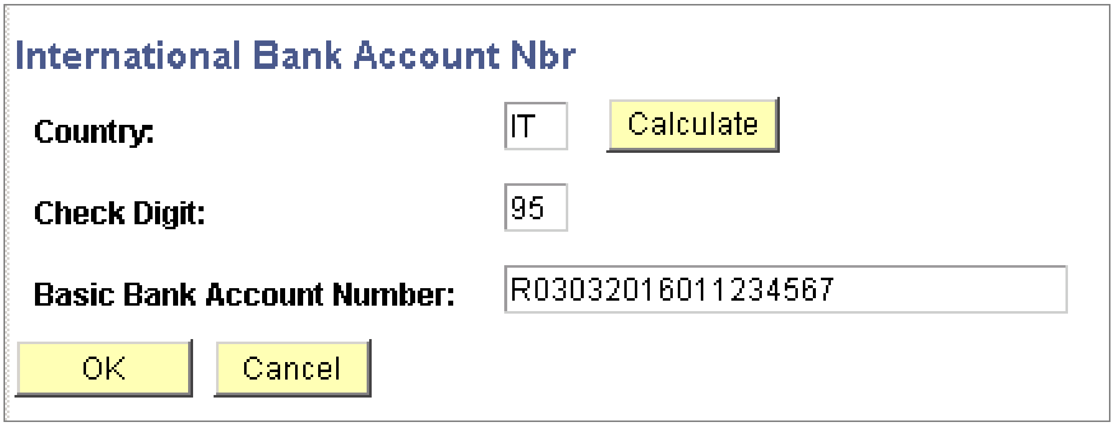
IBAN Country Setup page

Select the IBAN Enabled check box to enable IBAN functionality for a country. Once you select this check box, the IBAN field and the Edit IBAN link will appear on the Source Bank Accounts page:



Source Bank Accounts (IBAN functionality)

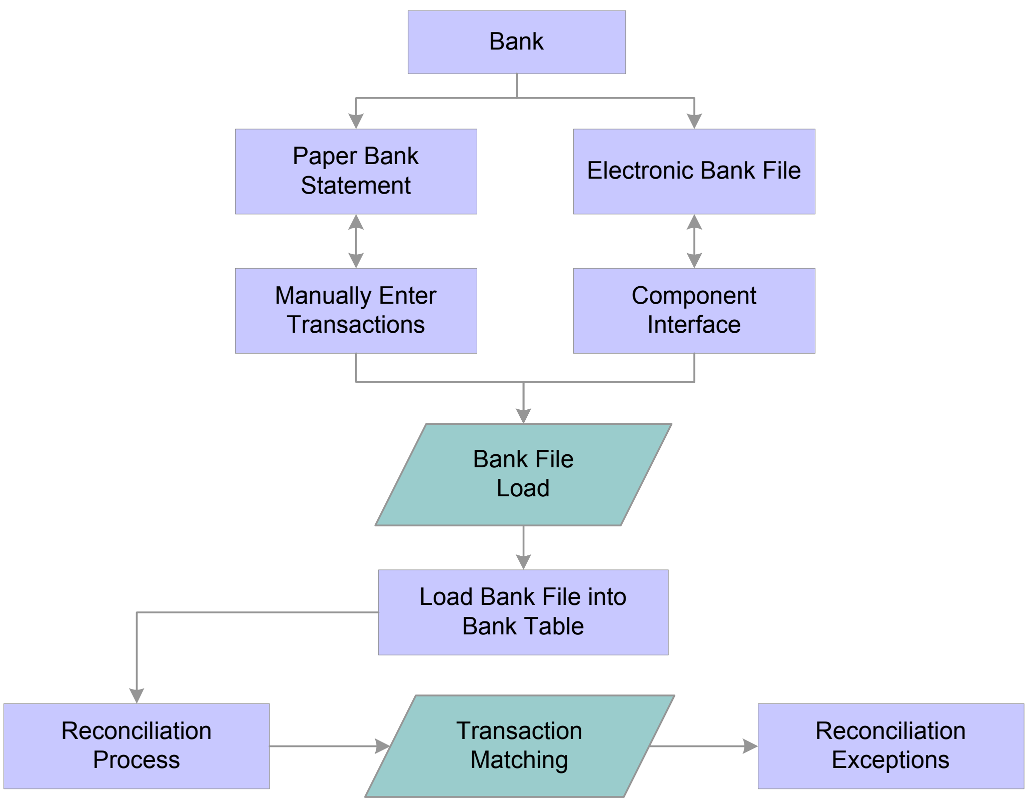
Clicking the Edit IBAN link will take you to the International Bank Account Number page, where you can enter or edit IBAN related information.



International Bank Account Nbr page

Payment Reconciliation Process

New with Global Payroll 8.9 is the bank reconciliation process. This process enables you to reconcile payments made from the Global Payroll system. This diagram illustrates the reconciliation process:

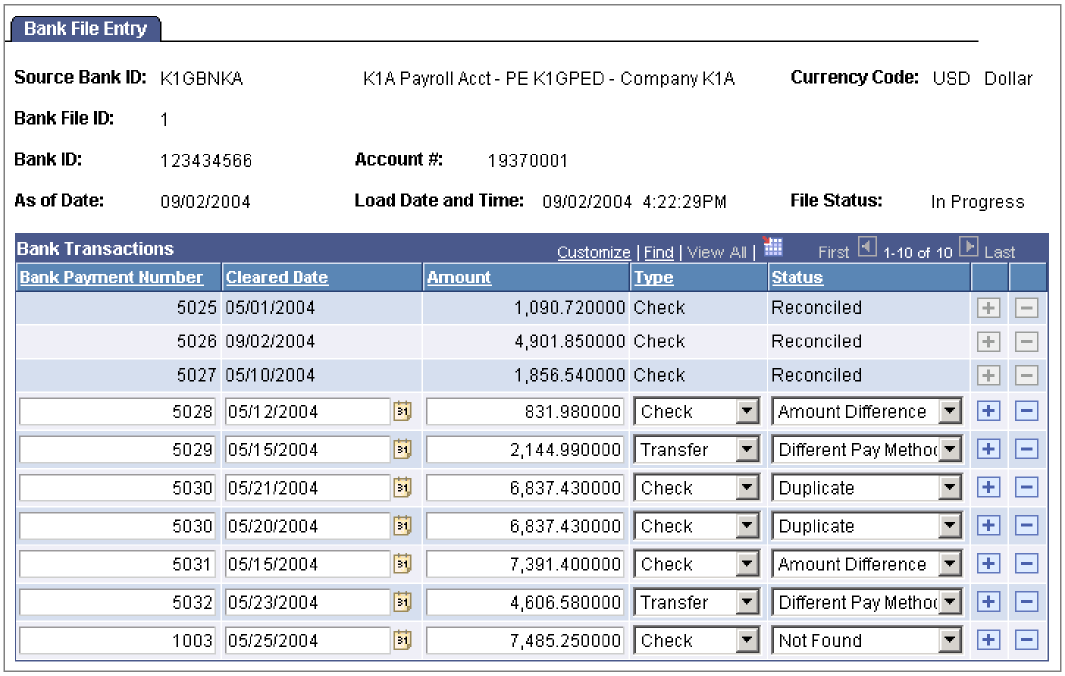


Payment reconciliation process

Entering Data

Financial institutions can provide data by issuing a paper bank statement or delivering an electronic file. If your organization gets a paper bank statement, the information will be entered manually on the Bank File Entry page. If you get an electronic file, you will use PeopleTools Component Interface to load the data in the Bank File Entry page.

Payment details are loaded on the Bank File Entry page:



Bank File Entry

Source Bank ID: K1GBNKA K1A Payroll Acct - PE K1GPED - Company K1A **Currency Code:** USD Dollar

Bank File ID: 1

Bank ID: 123434566 **Account #:** 19370001

As of Date: 09/02/2004 **Load Date and Time:** 09/02/2004 4:22:29PM **File Status:** In Progress

Bank Transactions Customize | Find | View All | First 1-10 of 10 Last

Bank Payment Number	Cleared Date	Amount	Type	Status
5025	05/01/2004	1,090.720000	Check	Reconciled
5026	09/02/2004	4,901.850000	Check	Reconciled
5027	05/10/2004	1,856.540000	Check	Reconciled
5028	05/12/2004	831.980000	Check	Amount Difference
5029	05/15/2004	2,144.990000	Transfer	Different Pay Methoc
5030	05/21/2004	6,837.430000	Check	Duplicate
5030	05/20/2004	6,837.430000	Check	Duplicate
5031	05/15/2004	7,391.400000	Check	Amount Difference
5032	05/23/2004	4,606.580000	Transfer	Different Pay Methoc
1003	05/25/2004	7,485.250000	Check	Not Found

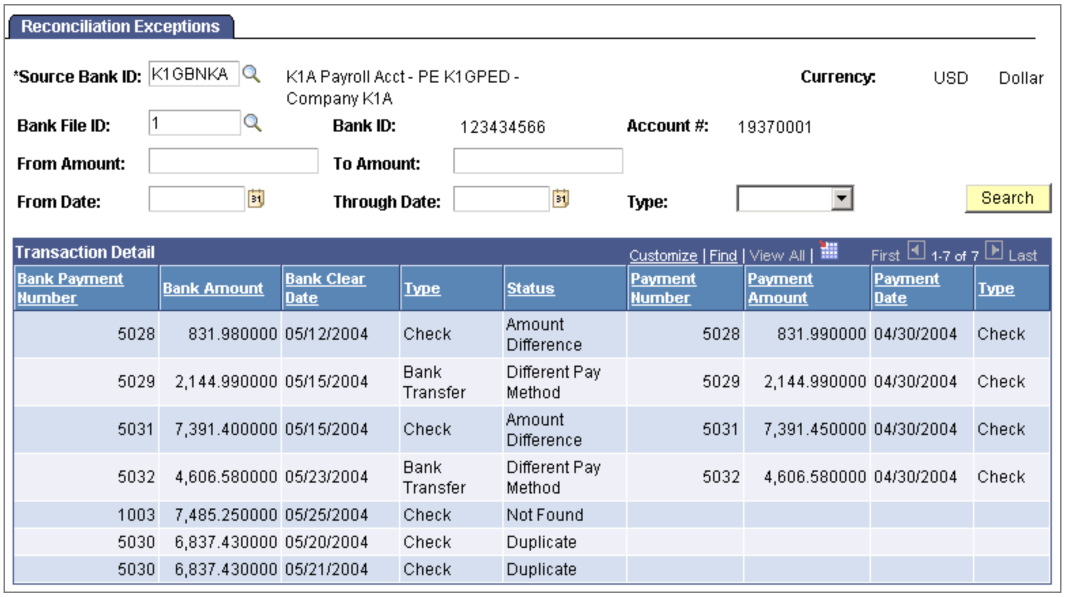
Bank File Entry page

Running the Reconciliation Process

The reconciliation process matches transactions that are found in the Bank File Entry page with those entries found in the system. The system tries to match transactions and if there are any discrepancies with the matching, exceptions are created.

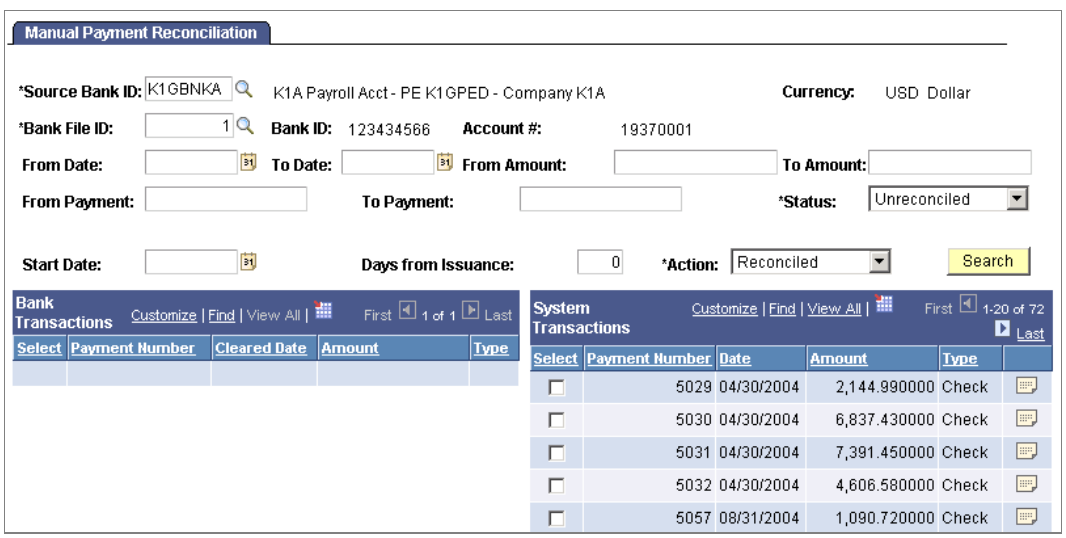
Reconciling Exceptions

An exception report helps you identify entries that do not match and enables you to resolve manually. You can enter search criteria to view reconciliation exceptions on the Reconciliation Exceptions page:



Reconciliation Exceptions page

You are able to manually reconcile these transactions using the Manual Payment Reconciliation page:



Manual Payment Reconciliation page

Integration

Global Payroll 8.9 builds on the foundation of its existing integrations with the introduction of a new PeopleSoft integration, as well as a streamlined presentation of ChartFields.

Standard ChartFields Configuration

New with Global Payroll 8.9, the standard ChartField configuration provides consistent use of ChartFields between PeopleSoft Enterprise General Ledger, Time and Labor, and Global Payroll. Financial Management allows General Ledger users to define how their ChartFields are displayed and used in combinations. HRMS 8.9 displays ChartFields exactly the way they appear in Financial Management.

Global Payroll 8.9 uses a valid list of values for each of the individual ChartFields but still only allows eight ChartFields for General Ledger processing. When Global Payroll distributes information to General Ledger, the complete set of ChartFields as defined in General Ledger for activity-based costing can be used, which allows more detailed costing from Payroll to General Ledger.

Time and Labor uses the values defined on the Standard ChartField Configuration page to track valid Financial Management ChartField values. The Time Administration process summarizes reported time to create payable time. Time and Labor provides Global Payroll with access to the ChartField attributes associated with that payable time.

The standard ChartField configuration identifies the ChartFields being used, the order of the ChartFields, the labels for the assigned ChartFields, the display length for each ChartField, the status (active or inactive) of each ChartField, and whether the ChartField is intraunit or interunit.

Standard ChartField Configuration

	Status	Order	*Field Long Name	*Field Short Name	Display Length	Affiliate Type	IntraUnit Related ChartField
	Active	1	Account	Acct	10		
	Active	2	Department	DeptID	10		
	Active	3	Project/Grant	Proj/Grt	15		
	Active	4	Product	Prod	6		
	Active	5	Fund Code	Fund	5		
	Active	6	Program Code	Program	5		
	Active	7	Class Field	Class	5		
	Active	8	Affiliate	Affl	5	InterUnit	Business Unit
	Active	9	Operating Unit	Operating Unit	8		
	Active	10	Alternate Account	Alt. Account	10		
	Active	11	Budget Reference	Budget Ref	8		
	Active	12	Chartfield 1	Chartfield1	10		
	Active	13	Chartfield 2	Chartfield2	10		
	Active	14	Chartfield 3	Chartfield3	10		
	Inactive	99	Fund Affiliate	Fund Affil	10	IntraUnit	
	Inactive	99	Operating Unit Affiliate	Oper Unit Affil	10	IntraUnit	

Activate | Inactivate | Impact | Configuration Status | Apply

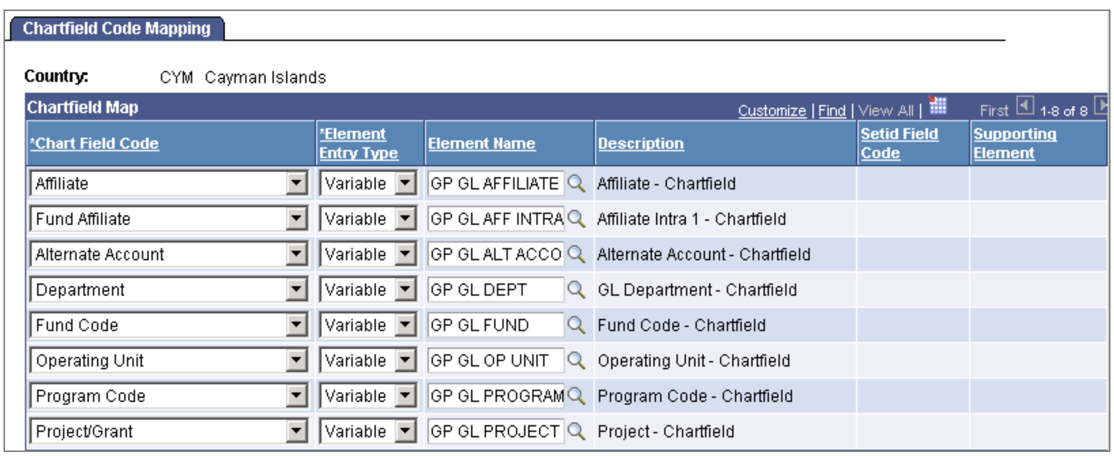
Standard ChartField Configuration page

Global Payroll 8.9 also delivers ChartField variable elements that prompt against the fifteen common ChartField tables.

The ChartField variable elements are:

- GP GL PRODUCT (Product - Chartfield)
- GP GLAFF INTRA1 (Affiliate Intra 1 - Chartfield)
- GP GLAFFILIATE (Affiliate - Chartfield)
- GP GLALTACCOUNT (Alternate Account - Chartfield)
- GP GLBUDGET REF (Budget Reference - Chartfield)
- GP GLCHARTFIELD1 (Chartfield 1 - Chartfield)
- GP GLCHARTFIELD2 (Chartfield 2 - Chartfield)
- GP GLCHARTFIELD3 (Chartfield 3 - Chartfield)
- GP GL CLASS (Class Field - Chartfield)
- GP GL DEPT (GL Department - Chartfield)
- GP GL FUND (Fund Code - Chartfield)
- GP GL OP UNIT (Operating Unit - Chartfield)
- GP GL PROGRAM (Program Code - Chartfield)
- GP GL PROJECT (Project - Chartfield)
- GP GLAFF INTRA2 (Affiliate Intra 2 - Chartfield)

Using the new Chartfield Code Mapping page in Global Payroll, you can map any of the payable time ChartField attributes to the corresponding Global Payroll ChartField variable elements.


Chartfield Code Mapping

Country: CYM Cayman Islands

Chartfield Map — Customize | Find | View All | First 1-8 of 8

*Chart Field Code	*Element Entry Type	Element Name	Description	Setid Field Code	Supporting Element
Affiliate	Variable	GP GL AFFILIATE	Affiliate - Chartfield		
Fund Affiliate	Variable	GP GL AFF INTRA	Affiliate Intra 1 - Chartfield		
Alternate Account	Variable	GP GL ALT ACCO	Alternate Account - Chartfield		
Department	Variable	GP GL DEPT	GL Department - Chartfield		
Fund Code	Variable	GP GL FUND	Fund Code - Chartfield		
Operating Unit	Variable	GP GL OP UNIT	Operating Unit - Chartfield		
Program Code	Variable	GP GL PROGRAM	Program Code - Chartfield		
Project/Grant	Variable	GP GL PROJECT	Project - Chartfield		

Chartfield Code Mapping page

Once you map the Time and Labor ChartFields to Global Payroll ChartField variables, the Calculate Absence and Payroll process retrieves time reporting codes, hours, and ChartField values from Time and Labor to create positive input for payees in Global Payroll.

PeopleSoft EnterpriseOne General Ledger Integration

Posting payroll data to General Ledger is one of the final steps in the payroll cycle. When a combination of products exists within an enterprise, it can be time consuming and costly to implement and maintain integration solutions.

PeopleSoft Enterprise Payroll with PeopleSoft EnterpriseOne General Ledger Integration enables synchronization between PeopleSoft Enterprise Payroll for North America or PeopleSoft Enterprise Global Payroll and PeopleSoft EnterpriseOne General Ledger.

The major steps involved in the integration of Global Payroll 8.9 and EnterpriseOne General Ledger that are performed on the Global Payroll side are:

1. Set up the Enterprise database for the integration.

   Set up the Enterprise Integration Broker node and messages to subscribe to EnterpriseOne data and to publish payroll accounting lines.

2. Initially load, configure, and map data:

   a. Configure the target system and product to identify the specific general ledger product and version.

   b. Map EnterpriseOne cost centers and accounts to Enterprise payroll data.

3. Routinely post payroll data to general ledger.

   a. The Enterprise Payroll application initiates synchronization of currency exchange rates if needed.

   b. The Enterprise payroll application processes and posts accounting lines to the EnterpriseOne staging table.

Note. EnterpriseOne integration is discussed elsewhere in this document.

See What's New in PeopleSoft Enterprise 8.9 to PeopleSoft EnterpriseOne Integrations?

Setting Up the Integration

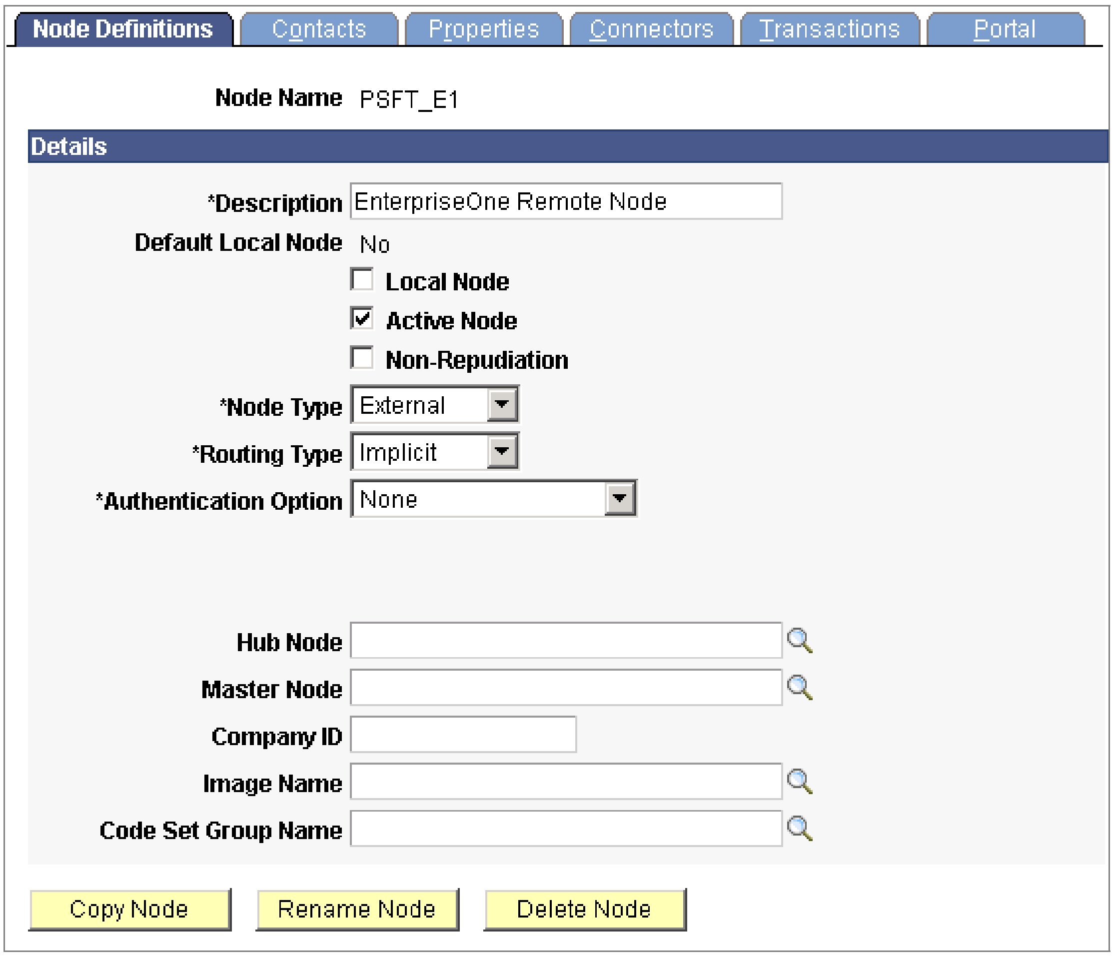
Global Payroll 8.9 uses the following messages to integrate with EnterpriseOne General Ledger:

- ACCOUNT_CHARTFIELD_FULLSYNC
- ACCOUNT_CHARTFIELD_SYNC
- BUS_UNIT_FS_SYNC
- BUS_UNIT_GL_FULLSYNC
- BUS_UNIT_GL_SYNC
- COST_CENTER_FULLSYNC
- COST_CENTER_SYNC
- GP_POST_GL

- GP_POST_GL_REPLY
- MARKET_RATE_REQ
- MARKET_RATE_SYNC

During integration setup, you verify the status of these messages and of their subscriptions.

You also create and configure a new PeopleSoft Integration Broker node, named PSFT_E1.

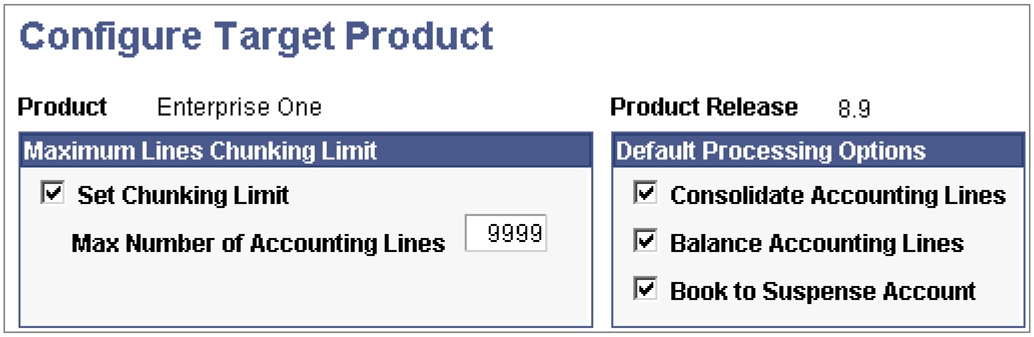


Node Definitions page showing the new PSFT_E1 node

Configuring the Target Product and System

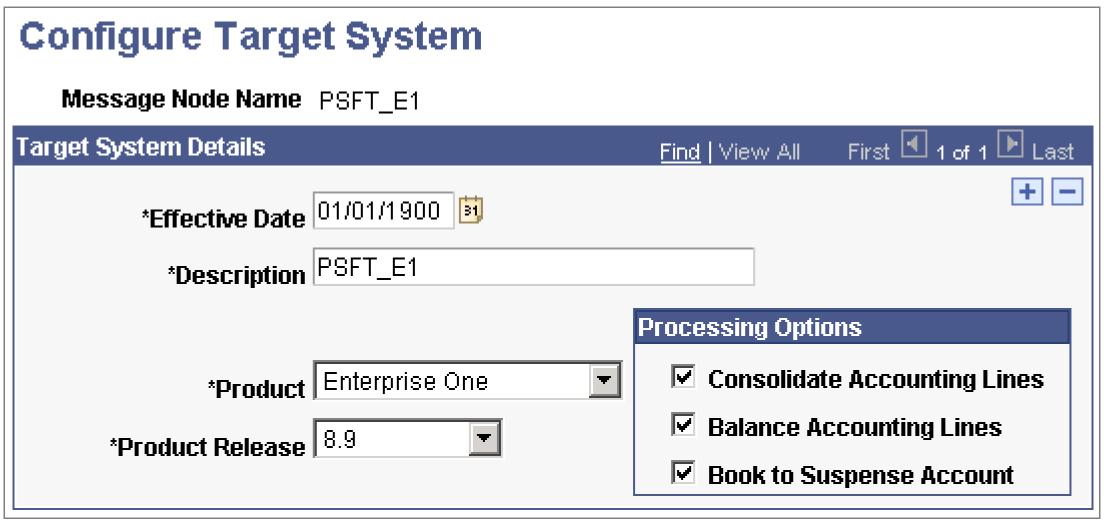
PeopleSoft Enterprise HRMS 8.9 has two pages that identify the target product and system, and enable you to set processing default options, such as whether to have the system calculate if the debits equal the credits for each general ledger business unit.

The Configure Target Product page sets processing default options for all EnterpriseOne products for a release.



Configure Target Product page

The Configure Target System page sets processing default options for the PSFT_E1 Integration Broker node.



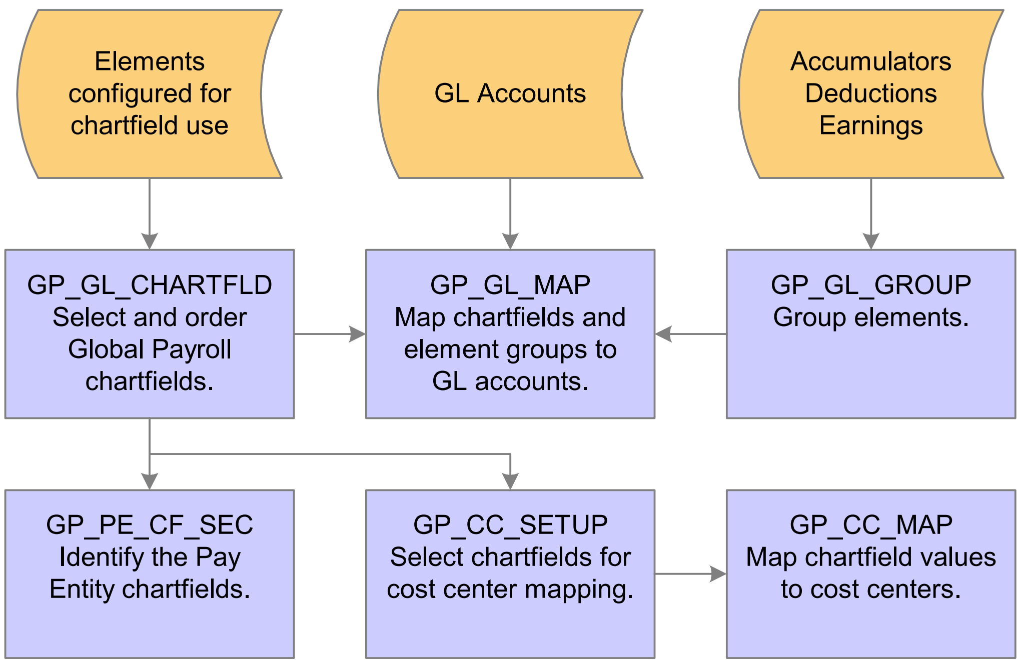
Configure Target System page

Mapping Cost Centers and Accounts

PeopleSoft EnterpriseOne General Ledger requires the cost center identity, which is not part of the standard accounting line data generated by Global Payroll. Therefore, cost centers must be mapped to the ChartFields so that the cost center can be derived and transmitted to EnterpriseOne.

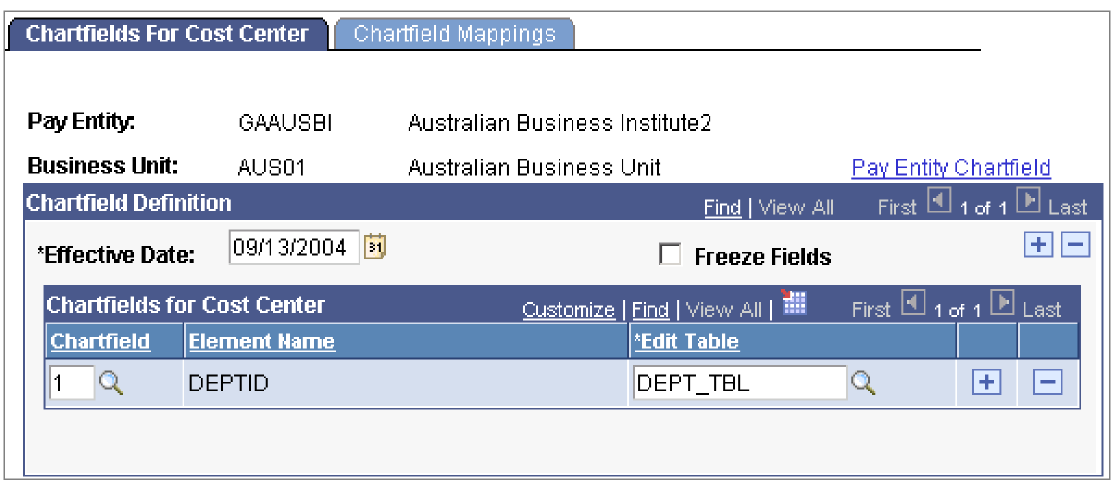
In Global Payroll, ChartFields are keyed by pay entity, business unit, and effective date.

The following diagram identifies the pages on which the account and cost center mapping tasks are accomplished and indicates the sources of the data used on the pages:



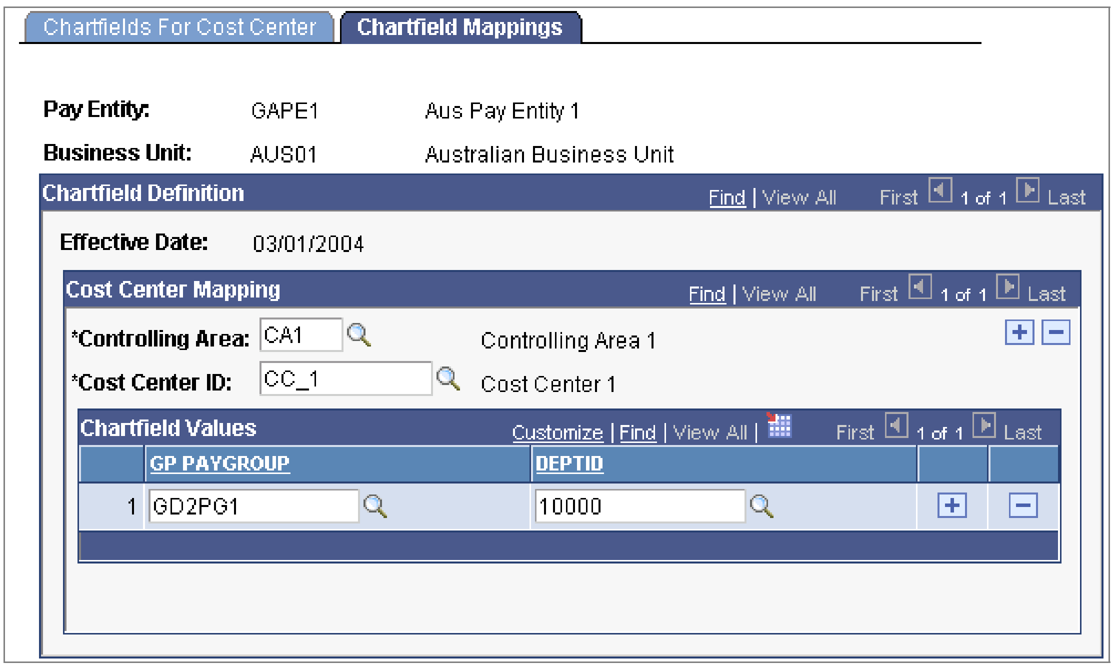
Cost center and account mapping for Global Payroll

The process of mapping cost centers and accounts for EnterpriseOne shown in the diagram uses some pages that already existed for the PeopleSoft Enterprise General Ledger integration. There are several pages that are used only for the EnterpriseOne integration. These pages are:



Chartfields for Cost Center page (GP_CC_SETUP)

GP Chartfield for Pay Entity page (GP_PE_CF_SEC)

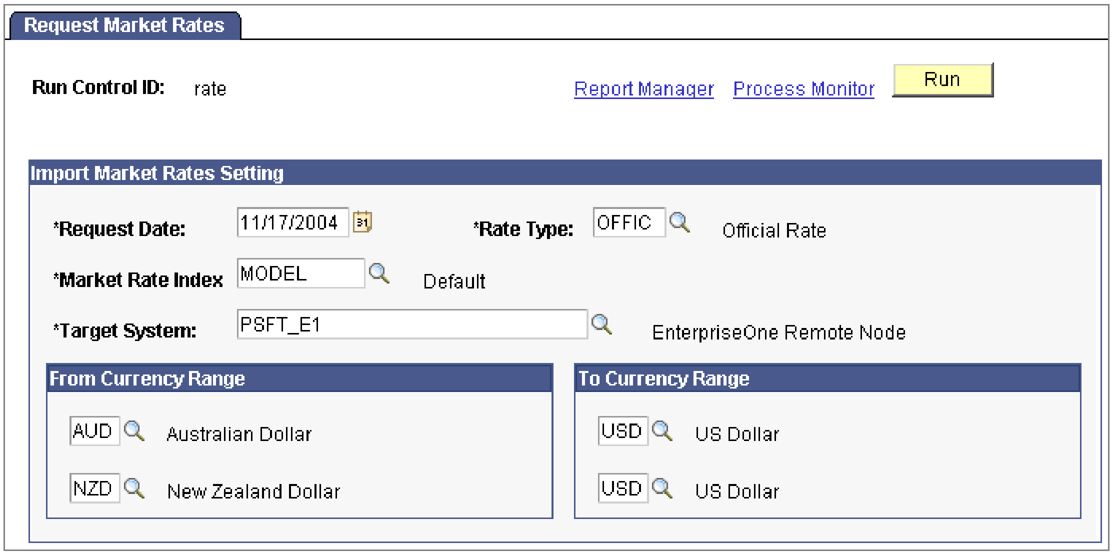


Chartfield Mappings page (GP_CC_MAP)

Retrieving Currency Exchange Rates

Currency market rates must be synchronized between the Enterprise payroll systems and the EnterpriseOne financial system, which is the master for market rates.

Using the Request Market Rates page, currency market rates can be requested from EnterpriseOne manually or on a set schedule.



Request Market Rates page

The steps involved in requesting currency market rates are:

1. Specify a currency or range of currencies and a date on the Request Market Rates page and submit the request.
2. The Integration Server sends back the MARKET_RATE_SYNC response message containing the market rates available for the specified currency pairs and date.
3. The Integration Broker subscription to the MARKET_RATE_SYNC message updates the Enterprise Market Rate Data table (RT_RATE_TBL).

Posting Accounting Lines From Global Payroll to General Ledger

After you process payroll in Global Payroll, you can create the accounting lines and post them as journal entries to General Ledger. A journal entry typically consists of header and line data.

The posting framework posts summary GL transactions grouped by GL business unit (Business_Unit_GL). As part of the posting, an Application Engine process prepares the data, creates the message, and publishes to the node that is specified for the GL business unit.

The Integration Server loads the data into the EnterpriseOne Journal Entry Transactions - Batch File table (F0911Z1). The Integration Server sends a reply message stating whether the transactions sent by Global Payroll were successfully posted and loaded into table F0911Z1.

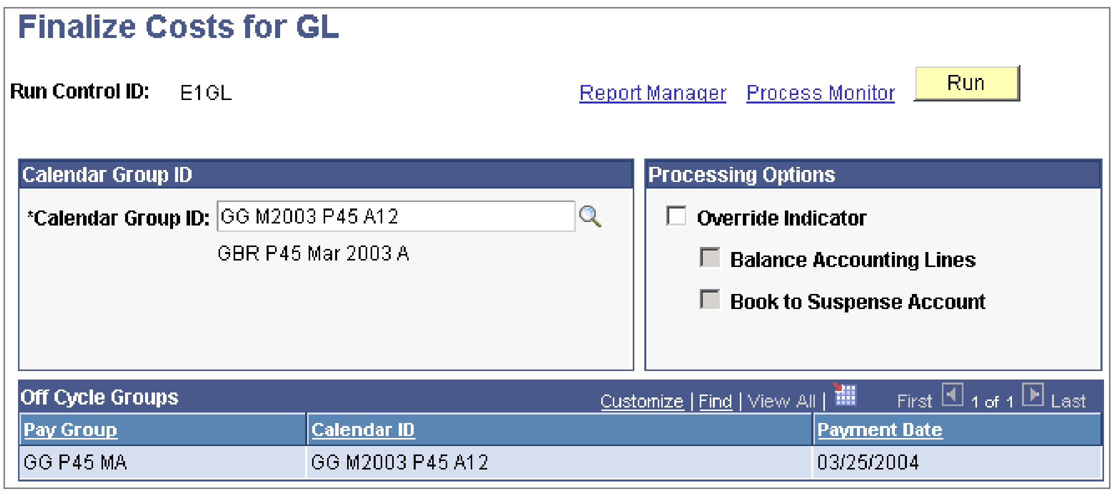
After the data has been loaded into table F0911Z1, you run a batch process to validate the data and to insert the records into the Account Ledger table (F0911). You then post the transactions from table F0911 to the Account Balances table (F0902) just as you would post any other transactions.

The steps for creating accounting lines in Global Payroll and publishing them to General Ledger are:

1. Calculate and finalize payroll.
2. Run the GL Transaction Creation Application Engine process (GP_GL_PREP) with the Calculate option selected to generate the payroll accounting lines on the GP Accounting Line table (GP_ACC_LINE).

   This process is run using a page common to both Enterprise and EnterpriseOne. However, for EnterpriseOne, you do not run the process using the Finalize option.
3. View the Transactions w/o Account (transactions without account) page to check for amounts not associated with accounts and make corrections as necessary.
4. Run the Finalize Costs for GL Application Engine process (HI_GP_POST) to post the journal entries to General Ledger.

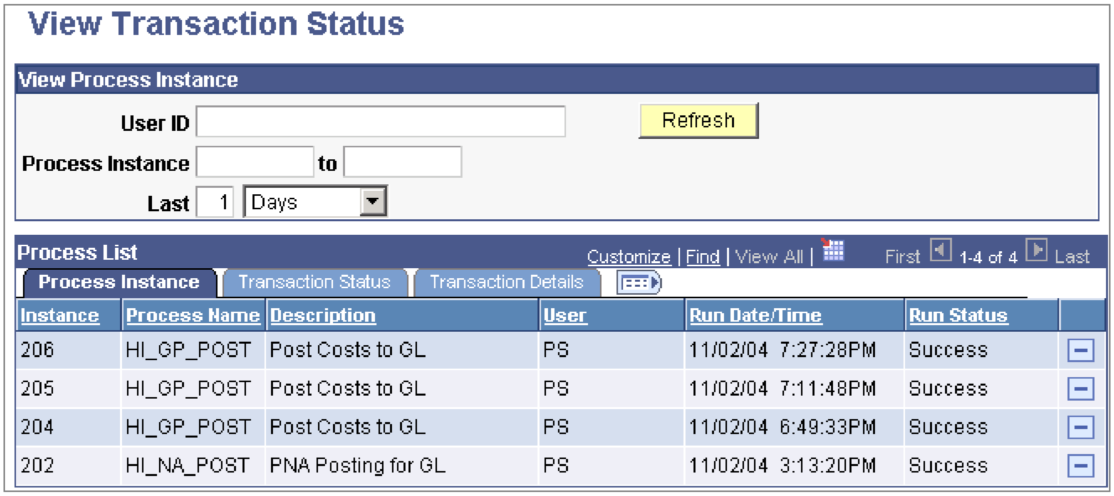
   This is an EnterpriseOne-specific process and page.



Finalize Costs for GL page

5. Check the status of the transaction on the View Transaction Status page.

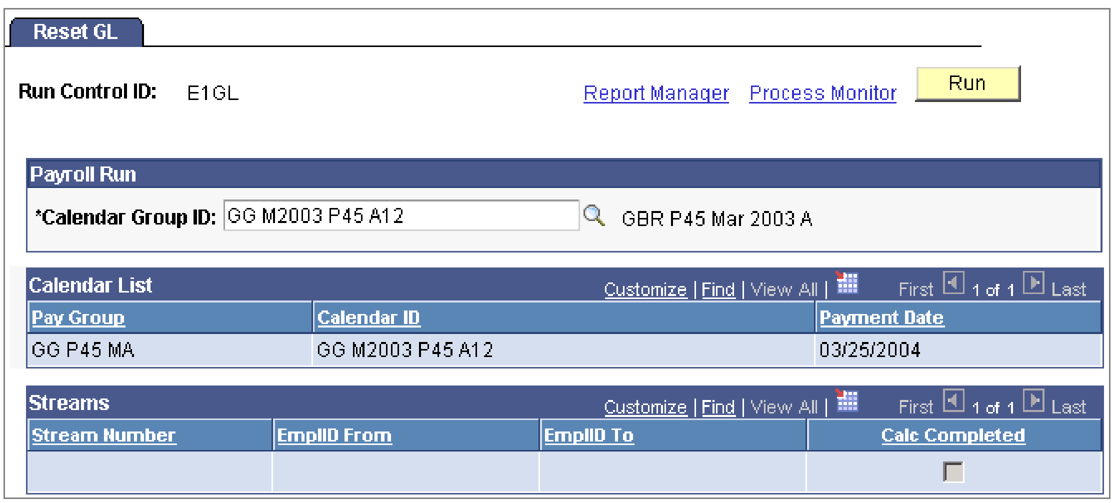
   This is a new page.



View Transaction Status page

6. If for any reason it is necessary to correct account data after it has been posted, you can run the GL Reset Process Application Engine process (GP_GL_RESET).

   After you run this process, you can make data corrections and repost the accounting lines. This process is used for both the Enterprise and EnterpriseOne integration, and is run from a new run control page.



Reset GL page

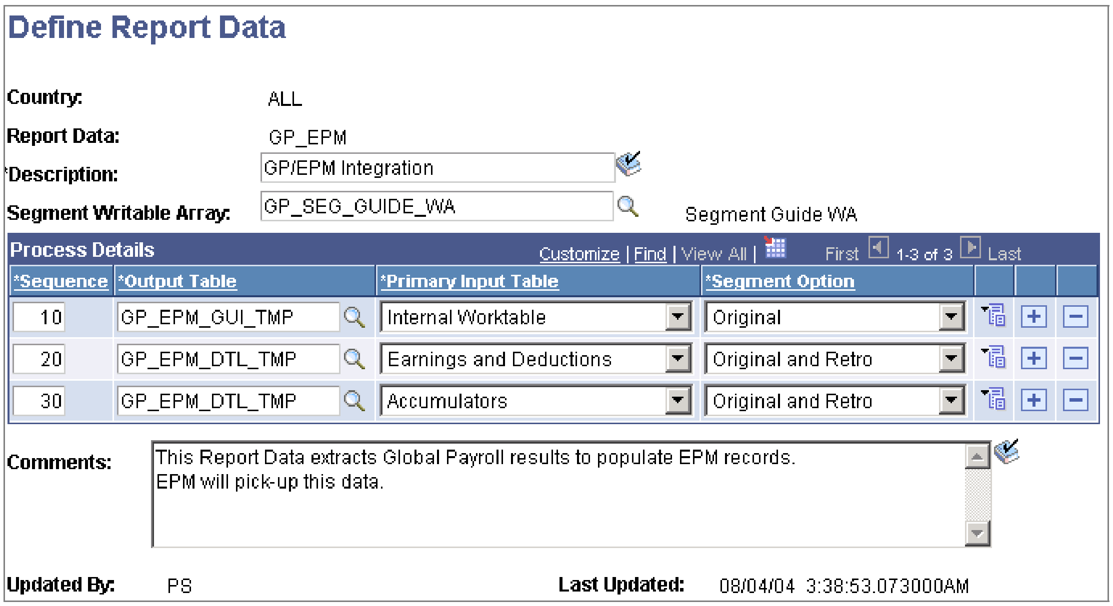
PeopleSoft Enterprise Performance Management Integration

You can now interface your Global Payroll system with the data warehouse in Performance Management. Through the Finalize phase of the Payroll COBOL process (GPPDPRUN), you can publish earning, deduction, and accumulator information into Global Payroll “EPM” tables, where the Performance Management product can access and subscribe to the data.

To prepare you system for integration, PeopleSoft delivers the following system data, that you may review and if needed, configure for a specific country:

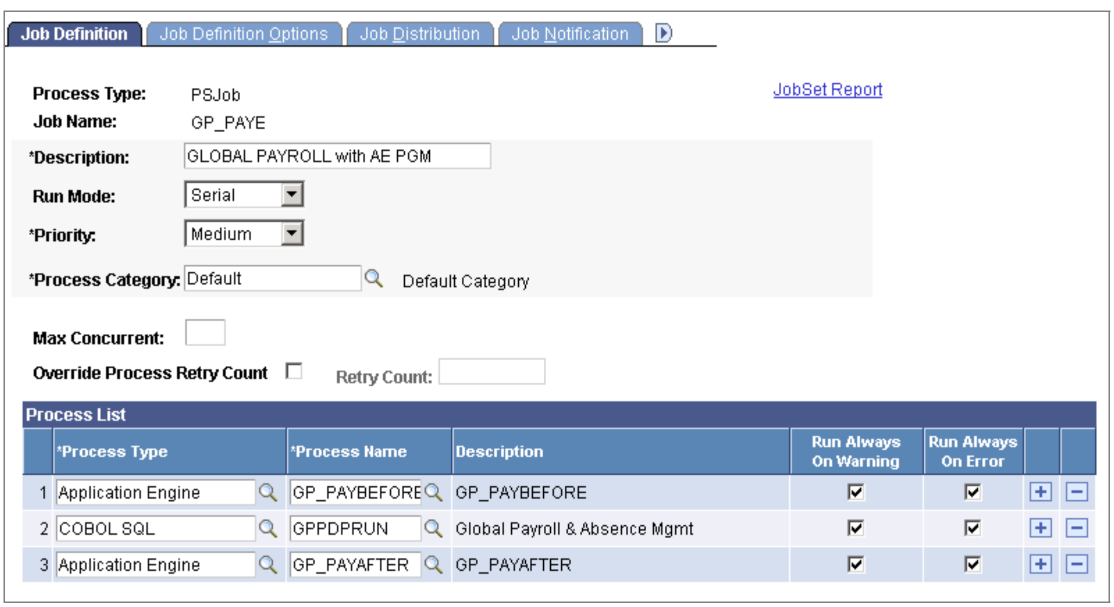
- Writable Array: GP WA GUIDE
- Report Data: GP_EPM
- PSJob Job Definition: GP_PAYE

You can review the delivered report data on a new page, the Define Report Data page:



Reviewing the delivered GP_EPM report data

You can also review the Job Definition for the PSJob of GP_PAYE:



Reviewing the delivered GP_PAYE Job Definition

Next, you run the finalize phase of the Payroll process, which loads the data into the Performance Management tables.

Once you have completed these steps, and completed all of the integration prerequisites in your Performance Management database, you can import the data into your Performance Management database.

Data Volume

Data volume is critical to all organizations. Global Payroll 8.9 includes enhancements that enable you to reduce the data volume required for your payroll system. By decreasing the amount of rows involved in processing, these enhancements also improve performance. Reduced data volume also means reduced hardware costs.

Accumulator Storage

Global Payroll 8.9 enables you to identify a balance as an absence accumulator or a payroll accumulator. You can then configure the system to store this balance in the result tables only after the appropriate calculation.

In the rare cases where an accumulator needs to be stored and updated in calendars of both calculation types, there is an option to define the accumulator as both types.

You can opt to store the balance as an absence calculation, a payroll calculation, or both.

Implementing this feature should reduce the size of the accumulator results table by almost 50%. This is a significant change because this is the largest single table in the Global Payroll system.

Previously, custom period accumulators would exist forever, taking up valuable disk space even after becoming obsolete. Now, you have the additional option of using end dates to tell the system when a custom period accumulator should end.

Bundling Absence Generated Positive Input

You may elect to bundle positive input that is written by the absence process for use by the payroll process. This enables you to consolidate several rows of daily absence data into a single row of generated positive input.

Use the Bundle PI on Output field on the Installation Settings page to bundle positive input

Process Stat and Segment Stat History Rows

The Global Payroll system no longer stores history rows on the two parent result data tables (process stat and segment stat). History rows are used to identify the source of accumulator balance information. Once a calendar group is finalized the history rows serve no further purpose, so they should not be left to clutter up permanent tables. In 8.9, the history rows are stored in a temporary table and are deleted when the calendar group is cancelled or finalized. Because the process stat and segment stat tables are used in so many SQL statements, a reduction in volume here is especially significant.

SOVR Rows on Generated Positive Input

Previously, each absence and Time and Labor transaction included an associated positive input SOVR row for the rate-as-of-date. In Global Payroll 8.9 the rate-as-of-date is an attribute of the generated positive input table itself, and no longer uses the additional SOVR row.

What's New in PeopleSoft Enterprise Global Payroll for Australia 8.9?

Making timely payments to your workforce while lowering your total cost of ownership is a business goal that your organization can achieve with Global Payroll for Australia. With Global Payroll, you have complete control over all aspects of your payroll operation, including statutory payroll and absence requirements.

Global Payroll for Australia 8.9 offers several modifications to simplify payroll processing for your organization:

- Support for Workplace Giving.
- Modifications to banking.
- Support for new Superannuation Guarantee regulations
- Changes to manual and separate check processing.
- Modifications to application navigation.
- Modifications to reports.
- Modifications to online payslips.

See Also

What's New in PeopleSoft Enterprise Global Payroll 8.9?

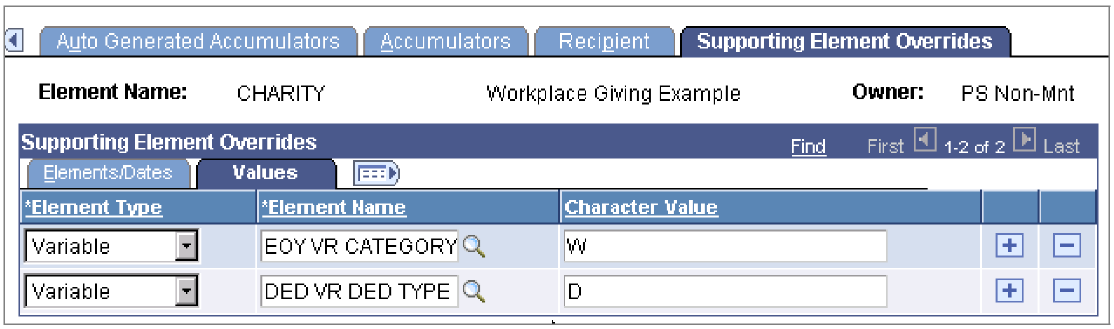
Support for Workplace Giving

Workplace Giving allows employees to donate money on a regular basis to one or more deductible gift recipients (DGRs), directly through their pay. A DGR is a charity or other organization that is entitled to receive tax deductible donations.

Workplace Giving is optional. Both the employee and the employer must agree to participate.

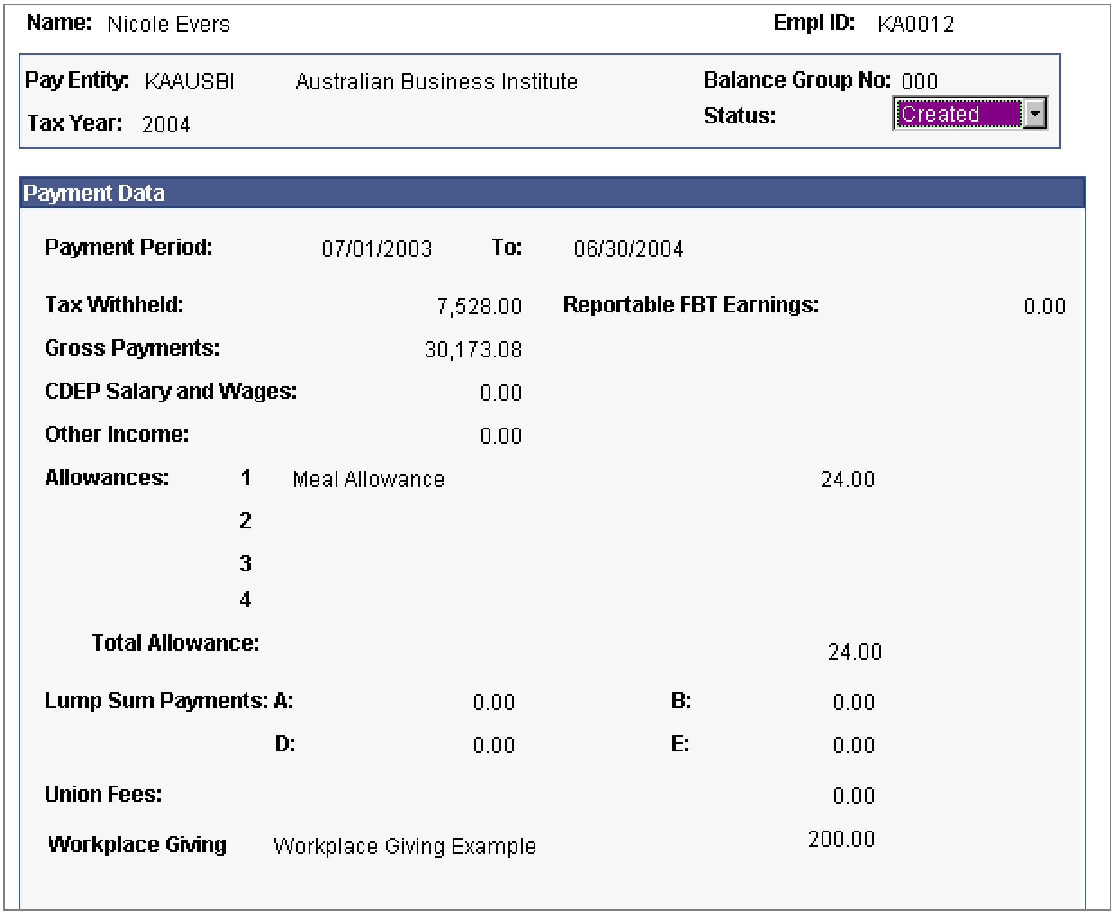
Delivered Charity Element

A single deduction element has been created which can be used by the employer as a recurring deduction or as a single positive input. The deduction reduces the taxable pay prior to the tax calculation and therefore reduces the employee's tax liability. The deduction is recorded on the Payment Summary at the end of the year.



Delivered Charity Giving Deduction

The results for the example charity element are then displayed on the pay summary as shown in the following example:



Workplace Giving Deduction on Pay Summary

Modifications to Banking

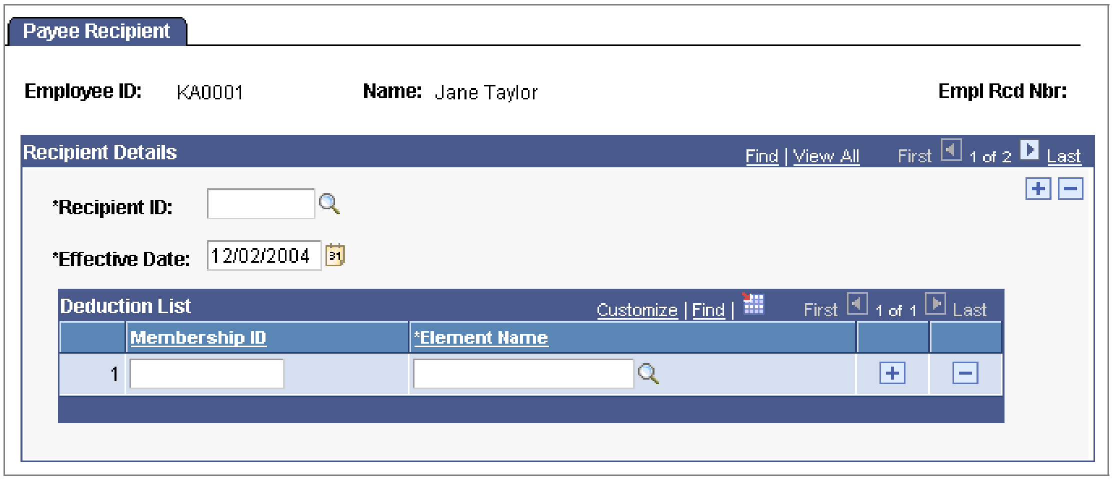
The country extension Run Payment Prep Process AUS page has been superseded by the Run Payment Prep Process page provided with the core Global Payroll application

Support for new Superannuation Guarantee Regulations

Section 23a Superannuation Guarantee (Administration Act 1992), Section 6a Superannuation Guarantee (Administration Amendment regulation 2003) requires that employers must report for each employee the amount of contribution, the name of the Superannuation fund to which the contribution is made, and the con number for the fund.

In the Payee Recipient page, the Recipient ID field is now defined as a high-order key, thereby allowing users to enter and maintain multiple membership IDs per recipient. Users can also now easily navigate through different Recipient IDs. The deduction list/all deduction hyperlink feature has been removed from the page; it is now delivered as part of the core Global Payroll Deduction Recipients Page.

When defining a deduction element, users can associate a general Recipient ID. This recipient becomes the default recipient for that deduction element. Alternatively the user can override the recipient at the employee level but only with individual Recipient IDs.



Defining recipients at the employee level

Changes to Manual and Separate Check Processing

Support for manual and separate checks is now provided by the new off-cycle payment feature. This feature is included with release 8.9 of the core Global Payroll application. For more information, see Off-Cycle Payroll Processing.

Modifications to Application Navigation

In release 8.9, navigation paths into Global Payroll have been changed as follows:

8.8 Navigation	8.9 Navigation
Global Payroll	Global Payroll & Absence Mgmt
Setup HRMS, Product Related, Global Payroll	Setup HRMS, Product Related, Global Payroll & Absence Mgmt

In addition, navigation paths to Global Payroll reports have been combined:

8.8 Navigation	8.9 Navigation
Global Payroll, Absence and Payroll Processing, Payroll Reports Global Payroll, Absence and Payroll Processing, Absence Reports	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Reports

Modifications to Reports

The Messages AUS report has been superseded by a messages report provided with the core Global Payroll application.

Online Payslips

With Global Payroll for Australia 8.9, you can generate PDF payslips that employees can view online if you purchase PeopleSoft Enterprise ePay.

Note. Online payslips are discussed elsewhere in this document.

See Also

What's New in PeopleSoft Enterprise ePay 8.9?

What's New in PeopleSoft Enterprise Global Payroll for Brazil 8.9?

Making timely payments to your workforce while lowering your total cost of ownership is a business goal that your organization can achieve with Global Payroll for Brazil. With Global Payroll, you have complete control over all aspects of your payroll operation, including statutory payroll and absence requirements.

Global Payroll for Brazil offers several modifications to simplify payroll processing for your organization:

- Changes to manual and separate check processing.
- Modifications to application navigation.
- Modifications to online payslips.

See Also

What's New in PeopleSoft Enterprise Global Payroll 8.9?

Changes to Manual and Separate Check Processing

Support for manual and separate checks is now provided by the new off-cycle payment feature. This feature is included with release 8.9 of the core Global Payroll application.

Modifications to Application Navigation

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In addition, navigation paths to Global Payroll reports have been combined:

8.8 Navigation	8.9 Navigation
Global Payroll, Absence and Payroll Processing, Payroll Reports Global Payroll, Absence and Payroll Processing, Absence Reports	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Reports

Online Payslips

With Global Payroll for Brazil 8.9, you can generate PDF payslips that employees can view online if you purchase PeopleSoft Enterprise ePay.

Note. Online payslips are discussed elsewhere in this document.

See Also

What's New in PeopleSoft Enterprise ePay 8.9?

What's New in PeopleSoft Enterprise Global Payroll for France 8.9?

Global Payroll for France gives you complete control over all aspects of your payroll operation, including statutory payroll and absence requirements.

In release 8.9, Global Payroll for France offers several significant enhancements to simplify payroll processing for your organization:

- Retroactivity.
- Enhancements to DADS.
- Enhancements to banking.

Retroactivity

Every customer must record retroactive updates that affect payroll. These retroactive updates can affect gross pay as well as deductions. In release 8.9, PeopleSoft provides the following new functionality for processing retroactive changes:

- Retroactivity standard setup.
- Support for corrective declarations.
- Additional reporting changes.
- Calculation of inactive segments.

These enhancements are designed to simplify and lower the cost of managing retroactive updates to payroll data.

Retroactivity Standard Setup

Beginning with release 8.9, PeopleSoft provides a standard setup for managing retroactive changes in the current year by using the corrective method, and enables you to process retroactive changes in previous years by using the forwarding method.

This setup addresses the most common cases of retroactivity, and enables you to:

- Calculate retroactive changes to the gross salary.
- Apply the current contribution rates for URSSAF, ASSEDIC, and other social organizations to the gross salary deltas.
- Declare contributions calculated retroactively.
- Manage most retroactive changes:
    - URSSAF scheme changes.
    - Contribution eligibility changes.
    - Change of establishment or company.
    - Retroactive hiring or departure.
    - Block recalculation of loans and garnishments.
    - Block recalculation of social contributions for completed years.

Note. Global Payroll for France does not deliver specific forwarding rules. If you decide to apply the delivered logic for processing retroactive changes—corrective for the current year and forwarding for past years—you must define your own forwarding rules.

The logic used to manage gross salary changes depends on the organization collecting the contributions:

- For URSSAF, ASSEDIC, and CSG/CRDS, the system performs a *partial recalculation* of the gross salary elements.

  Some organizations such as URSSAF and ASSEDIC require that companies submit gross salary elements to the contribution rates in effect on the payment date. For example, if a payee receives a retroactive pay increase, the contribution rates of the current period should be applied to the gross salary deltas, rather than those in effect in the recalculated period.

  To manage this, Global Payroll for France:

  - Recalculates the gross salary, taking into account the elements modified retroactively.
  - Stores the recalculated gross in accumulators.
  - Retrieves the old value of the gross when calculating contributions in a prior period (rather than using the recalculated gross).
  - Recalculates funding bases, based on the old gross value, using standard rules.
  - Uses the annual regularization of contributions principle to process the recalculated gross deltas in the current period using the rates currently in effect.

  Note. The process described here is referred to as a *partial recalculation* because the gross salary used is the *old* or *previously calculated* gross.

- For other contributions such as ARRCO and tax levies, Global Payroll for France performs a *full recalculation* of the gross salary elements: the system does not retrieve the old gross values, but fully recalculates the gross salary and funding bases, and replaces the original calculations with the new ones (in keeping with the corrective retro method).

Support for Corrective Declarations

Retroactive processing impacts not only the calculation of social contributions for URSSAF, ASSEDIC, and AGIRC/ARRCO, but also the declaration of these contributions. Global Payroll for France follows the DUCS norms for declaring contributions. The latest version of these norms permits corrective declarations, and PeopleSoft has taken advantage of the new standards to develop solutions for reporting retroactive changes.

PeopleSoft delivers two kinds of declarations for reporting changes to social contributions:

- Additive Declarations

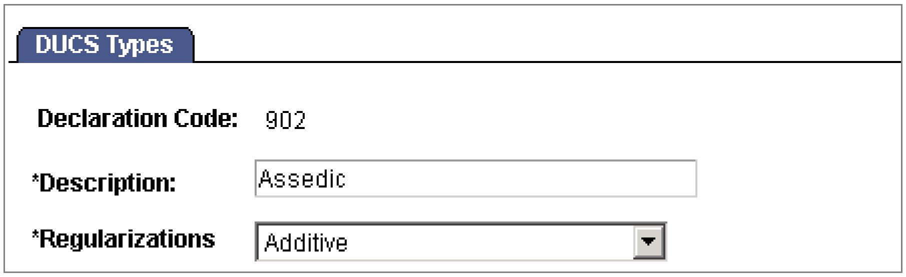
  In an additive declaration, the funding bases from recalculated periods are added to the funding base in the current period.

- Rectified Declarations

  In a rectified declaration, separate "rectification" reports are issued for each period recalculated. The gross deltas are not combined and different rates can be attached to the deltas as well as the current period base.

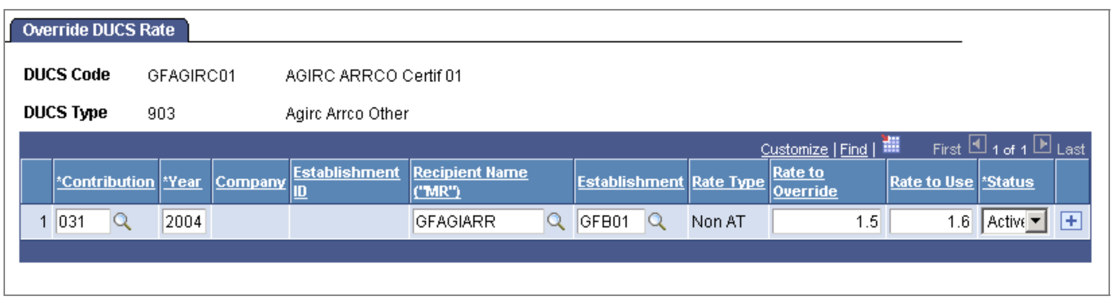
In Global Payroll for France, each reporting organization is assigned one of these declaration methods, following the new DUCS norms.

If the official rules for making retroactive declarations changes, you can easily modify the reporting method for the social organization on the DUCS Types page:



Modifying the reporting method on the DUCS Types page

In addition, Global Payroll for France enables you to correct rate information in the DUCS file: If you calculate contributions using incorrect rates in a prior period, a retro calculation will reverse the initial calculations, and the contributions with the incorrect rates will be reversed in the current DUCS declaration. The Override DUCS Rate page enables you to replace the incorrect rates with the true rates:



Overriding incorrect rates on the Override DUCS Rate page

> **Note.** Global Payroll for France 8.9 must be certified by the DUCS committee to be fully compliant with DUCS 4.2. Any modifications related to this certification will be delivered in a bundle following the general availability of 8.9.

Additional Reporting Changes

In release 8.9, the payslip, DADS reports, and the ASSEDIC and illness certificates have been modified to ensure that they work with the corrective method for processing retroactivity.

Calculation of Inactive Segments

When a retroactive calculation is triggered after a change of company, or when positive input is assigned to a terminated employee, inactive segments can be produced.

In release 8.9, we provide a standard calculation of inactive segments by:

- Inactivating the calculation of worked hours and days.
- Controlling which pay elements should be triggered and which shouldn't be triggered.
- Managing isolated amounts paid after a termination.
- Managing contribution ceilings.
- Handling the declaration of these segments in the DADS report.

Enhancements to DADS

PeopleSoft designed the DADS year-end report to conform to new DADS-U norm beginning with the first release of Global Payroll for France. Now DADS-U is mandatory and will replace the old TDS norm starting in 2006 for calendar year 2005 declarations. PeopleSoft has used customer feedback to enhance the DADS-U report for all supported releases and is making the following enhancements:

- Additional reporting capabilities.
- Enhancement of error handling.
- Other minor enhancements.

Additional Reporting Capabilities

Every customer should validate the DADS report before submitting the file. PeopleSoft provides tools that make it easier to format DADS data and to review employee information.

You can define custom reports using the DADS Reporting Definitions component. You create an ID number for your custom report; you then choose one or more DADS structures to include with your custom report. You can select one or more custom reports to run, then specify which DADS Sending Reference to run the report against.

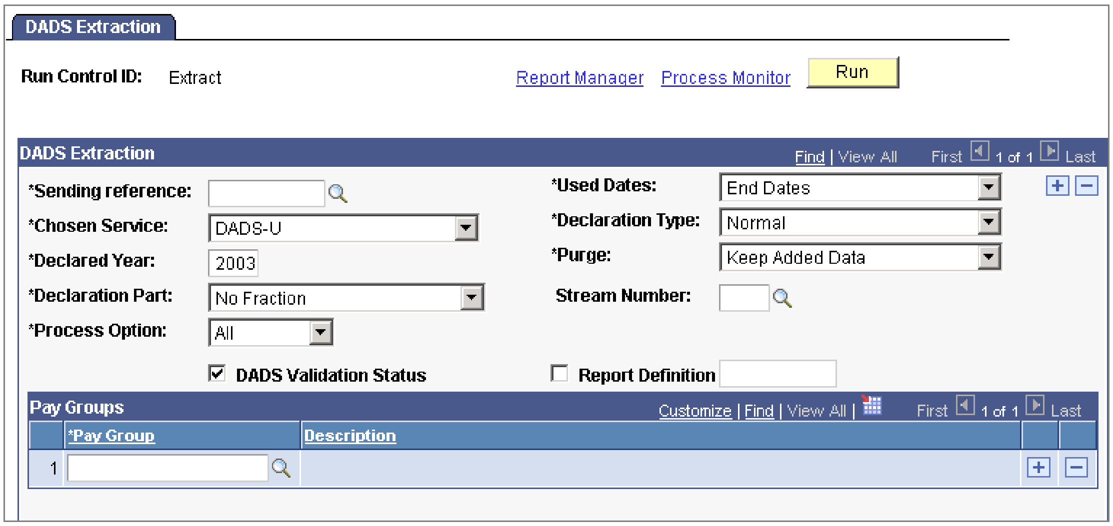
Enhancement of Error Handling

Customers report that correcting DADS is time consuming and inefficient. Data errors can come from various sources, and the DADS validation process is not easy or straightforward.

In response to these concerns, PeopleSoft provides significant new error management capabilities:

- Enhanced error validation.

  When running the DADS extraction process, you now have the option to automatically validate the extracted data. To do this, select the DADS Validation Status check box on the DADS Extraction page:

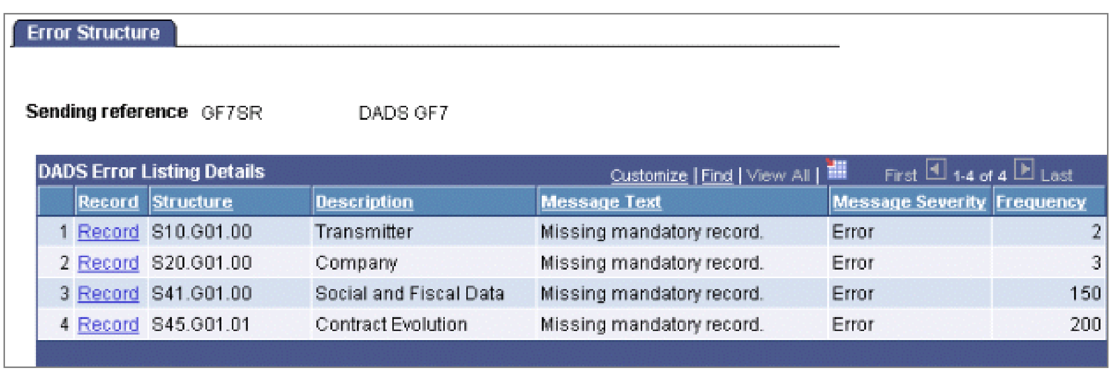


Enabling automatic data validation on the DADS Extraction page

  When you select DADS Validation Status, the application checks each element for errors during the extract process.

- Enhancements to the error handling process and the ability to quickly review and fix errors online.

  When data extraction is complete, you can view and fix errors online using the List DADS Errors FRA component. This component includes an initial page that lists the number of errors, warnings, and so on; a page that lists the types of errors per structure; and a page that provides a detailed description of each error (organized by type) within a given structure, and which contains links to the database pages where you must go to resolve the errors:



The Error Structure page displays the frequency of errors in a structure, and provides links to other pages where you can view and correct errors.

- Ability to generate a comprehensive error report in print form.

  PeopleSoft provides a new paper report that enables you to analyze, correct, and prevent DADS errors. This report lists both DADS extraction errors and character errors. It is divided into a summary page that lists counts per error, and a detail page that describes each error. You can control when the detail page is generated by setting parameters on the File Generation page. Using this report and the list of data errors on the Error Structure page, you can discover recurring problems, and fix them with mass updates.

- In addition, to speed up the process of checking for valid characters, you now have the option to check either data that has not been validated previously, or data that has been edited since the extraction. By choosing one of those options, the DADS character checking logic does not have to re-check data that has already been validated.

Other Minor Enhancements

To enhance user productivity, we analyzed the DADS process and provided several minor enhancements:

- Ability to populate all establishments, or to include and exclude establishments when creating the Sending Reference.
- Ability to populate DADS tables. We provide a component interface to facilitate this process. You can import DADS-related data from an external payroll system, then run the DADS-U report from within Global Payroll for France. This is useful if you plan to switch to Global Payroll for France in the middle of the year. Alternately, you might have a subgroup of persons who are managed by an external payroll system. You can import their DADS-related data, and then generate a single DADS file for your entire enterprise.

These enhancements benefit any company that uses Global Payroll for France.

Enhancements to Banking

The banking process enables you to pay both employees and third parties, as in the case of alimony and garnishments. This process is made up of two parts. One is defined in the core application, and the other is defined in the country extension for France. In the core application, you specify source banks at the pay entity level. These are the employer banks that are used to pay the employee or the third party. Although the core application allows for multiple source banks, until now, Global Payroll for France has limited customers to one source bank per pay entity.

In release 8.9, Global Payroll for France supports multiple source banks. We generate a different payment file for each source bank and adapt the existing payment report.

In addition, we have enhanced the banking process to allow payments for multiple recipients and integrate the recipients in the garnishment page.

What's New in PeopleSoft Enterprise Global Payroll for Germany 8.9?

Making timely payments to your workforce while lowering your total cost of ownership is a business goal that your organization can achieve with Global Payroll for Germany. Global Payroll for Germany has attained a certification for excellence in social insurance reporting (DEUEV) and has met all German requirements for statutory calculations and reporting.

Global Payroll for Germany 8.9 delivers two new categories of features to help you comply with recent legislation and stay current with new payroll trends[1]:

- eGovernment.
- Old-age part-time tax enhancement.

eGovernment

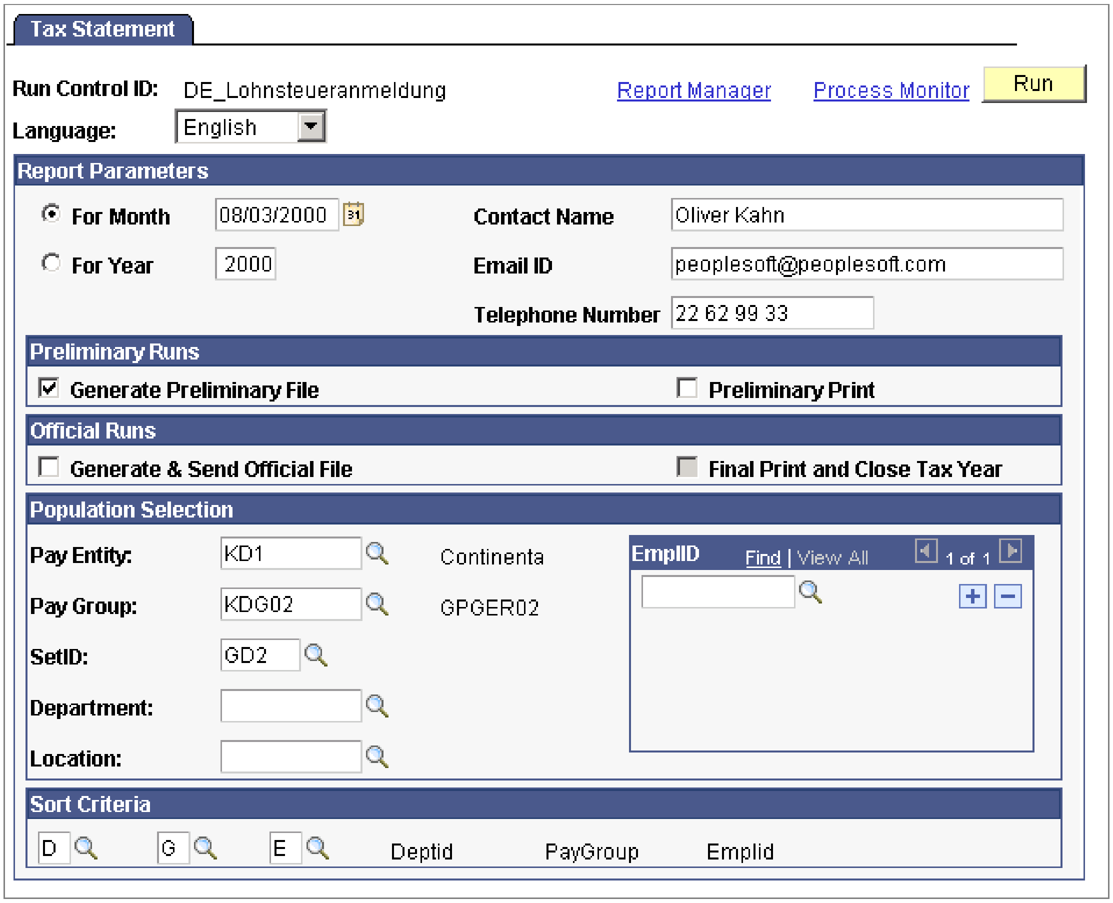
Governments are under increasing pressure to cut costs and serve online constituencies. eGovernment—or online government—involves the transformation of internal and external relationships within the public sector through internet-enabled processes to optimize service delivery, constituency participation, and governance.

Global Payroll for Germany 8.9 delivers several important new eGovernment enhancements to help organizations adapt to the growing demands and opportunities of eGovernment.

Data Transmission of Tax Statement (ELSTER)

In compliance with recent German tax legislation, tax statements may be transmitted electronically to the tax office over the internet in XML. The German tax administration initiated Project ELSTER (Elektronische Steuererklaerung, or electronic tax return) with the goal of simplifying tax declarations via an electronic interface.

[1] The following features are also delivered with Global Payroll for Germany 8.8 as part of a service pack.

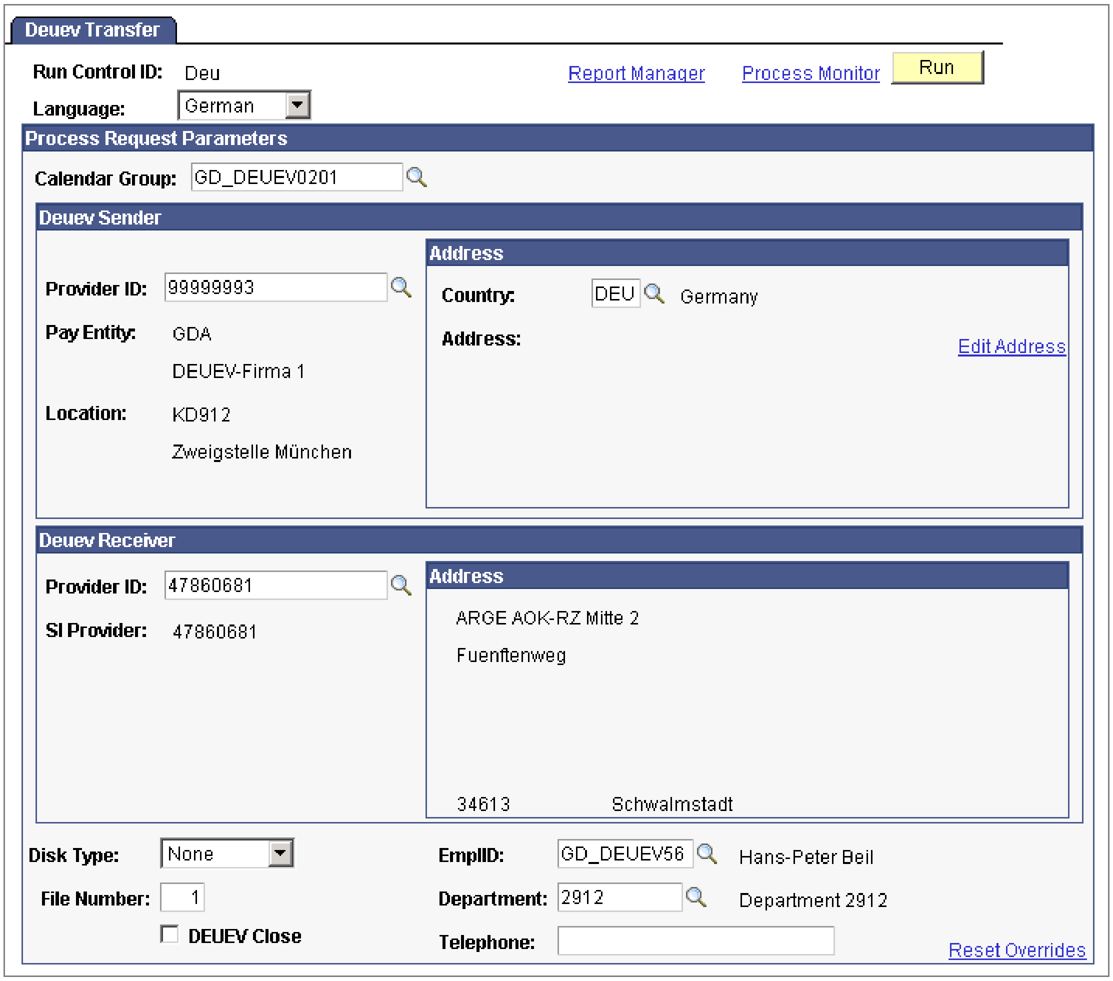


The tax statement page enables you to deliver tax files electronically.

Global Payroll for Germany 8.9 delivers a standard process to transfer tax statements electronically to the German tax administration. In addition to the cost savings realized by purely online reporting, payroll administrators also benefit—from no longer having to attach tax statements manually to the tax card.

DEUEV Data Transmission

DEUEV (Datenerfassungs und übermittlungsverordnung) refers to a set of standards that are defined for tracking and reporting on social insurance information. In accordance with recent German legislation, social insurance data and contribution lists should be transmitted to social insurance providers as a data file by encrypted email rather than in paper form.



The DEUEV Transfer page launches a process that encrypts and sends your social insurance information.

Global Payroll for Germany currently provides a data file with social insurance data and contribution lists. In 8.9, we also deliver the integration to an electronic data transfer process, thus helping our customers to reduce the number of manual steps that are involved with social insurance reporting.

DEUEV Recertification

In 2002, Global Payroll for Germany received the DEUEV certification from a coalition of German social insurance providers (ITSG), demonstrating PeopleSoft's ongoing commitment to deliver secure, accurate, user-friendly social insurance reporting.

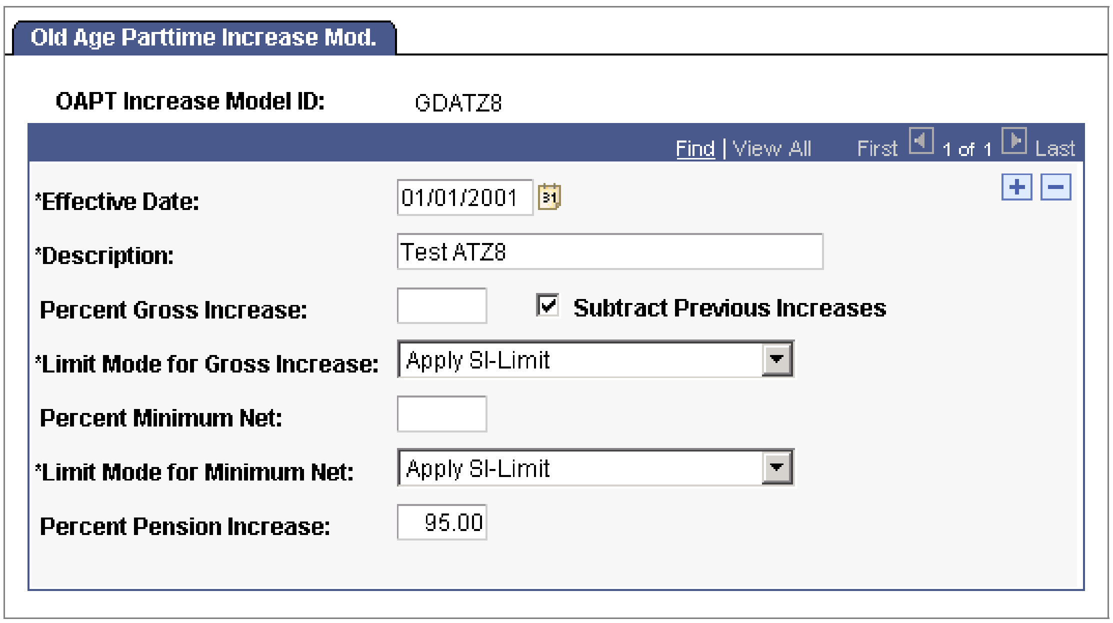
Disabled Employee Reporting (REHADAT)

German employers must pay a fine if they fail to employ the required number of heavily disabled persons. A third-party provider, REHADAT, produces the necessary reports for the unemployment office.

Global Payroll for Germany 8.9 delivers a standard data file for disability reporting to the REHADAT program, REHADAT-Elan 03, which generates the necessary handicapped reports for the Unemployment Office.

Old-Age, Part-Time Tax Enhancement

German old-age, part-time legislation was enacted to allow workers to acclimate gradually to leaving the workforce. The legislation allows companies to phase people into retirement by allowing them to work on a part-time basis several years before retiring. Old-age, part-time workers receive a supplemented part-time salary to make the plan more attractive, and their regular social insurance contributions continue to be paid by the company. They receive their full benefits on retirement, but take-home pay is capped to limit the benefits of dropping into a lower tax bracket.



Global Payroll for Germany enables you to manage multiple old-age, part-time increase models.

To offset the rising costs of the old-age, part-time program, the calculation rules for old-age, part-time workers were changed as of July 1, 2004. Anyone entering the old-age, part-time program as of July 1, 2004, is affected by the new rules, while workers already in the program will continue to be paid according to the old rules. Global Payroll for Germany 8.9 supports both sets of calculation rules.

What's New in PeopleSoft Enterprise Global Payroll for Hong Kong 8.9?

Making timely payments to your workforce while lowering your total cost of ownership is a business goal that your organization can achieve with Global Payroll for Hong Kong. With Global Payroll, you have complete control over all aspects of your payroll operation, including statutory payroll and absence requirements.

Global Payroll for Hong Kong offers several modifications to simplify payroll processing for your organization:

- Modifications to banking.
- Changes to manual and separate check processing.
- Modifications to application navigation.
- Modifications to reports.
- Modifications to online payslips.

See Also

What's New in PeopleSoft Enterprise Global Payroll 8.9?

Modifications to Banking

The country extension Run Payment Prep Process HKG page has been superseded by the Run Payment Prep Process page provided with the core Global Payroll application.

Changes to Manual and Separate Check Processing

Support for manual and separate checks is now provided by the new off-cycle payment feature. This feature is included with release 8.9 of the core Global Payroll application. For more information, see Off-Cycle Payroll Processing.

Modifications to Application Navigation

In release 8.9, navigation paths into Global Payroll have been changed as follows:

8.8 Navigation	8.9 Navigation
Global Payroll	Global Payroll & Absence Mgmt
Setup HRMS, Product Related, Global Payroll	Setup HRMS, Product Related, Global Payroll & Absence Mgmt

In addition, navigation paths to Global Payroll reports have been combined:

8.8 Navigation	8.9 Navigation
Global Payroll, Absence and Payroll Processing, Payroll Reports Global Payroll, Absence and Payroll Processing, Absence Reports	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Reports

Modifications to Reports

The Payee Message HKG report has been superseded by a messages report provided with the core Global Payroll application.

Online Payslips

With Global Payroll for Hong Kong 8.9, you can generate PDF payslips that employees can view online if you purchase PeopleSoft Enterprise ePay.

Note. Online payslips are discussed elsewhere in this document.

See Also

What's New in PeopleSoft Enterprise ePay 8.9?

What's New in PeopleSoft Enterprise Global Payroll for India 8.9?

Making timely payments to your workforce while lowering your total cost of ownership is a business goal that your organization can achieve with Global Payroll for India. With Global Payroll, you have complete control over all aspects of your payroll operation, including statutory payroll and absence requirements.

Global Payroll for India offers several modifications to simplify payroll processing for your organization:

- Modifications to banking.
- Modifications to application navigation.
- Modifications to online payslips.

See Also

What's New in PeopleSoft Enterprise Global Payroll 8.9?

Modifications to Banking

The country extension Run Payment Prep Process IND page has been superseded by the Run Payment Prep Process page provided with the core Global Payroll application.

Modifications to Application Navigation

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Online Payslips

With Global Payroll for India 8.9, you can generate PDF payslips that employees can view online if you purchase PeopleSoft Enterprise ePay.

Note. Online payslips are discussed elsewhere in this document.

See Also

What's New in PeopleSoft Enterprise ePay 8.9?

What's New in PeopleSoft Enterprise Global Payroll for Italy 8.9?

Making timely payments to your workforce while lowering your total cost of ownership is a business goal that your organization can achieve with Global Payroll for Italy. With Global Payroll, you have complete control over all aspects of your payroll operation, including statutory payroll and absence requirements.

Global Payroll for Italy 8.9 offers enhancements to application navigation to simplify payroll processing for your organization and online payslips.

Modifications to Application Navigation

In release 8.9, navigation paths into Global Payroll have been changed as follows:

8.8 Navigation	8.9 Navigation
Global Payroll	Global Payroll & Absence Mgmt
Setup HRMS, Product Related, Global Payroll	Setup HRMS, Product Related, Global Payroll & Absence Mgmt

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Global Payroll, Absence and Payroll Processing, Payroll Reports Global Payroll, Absence and Payroll Processing, Absence Reports	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Reports

Online Payslips

With Global Payroll for Italy 8.9, you can generate PDF payslips that employees can view online if you purchase PeopleSoft Enterprise ePay.

Note. Online payslips are discussed elsewhere in this document.

See Also

What’s New in PeopleSoft Enterprise ePay 8.9?

What’s New in PeopleSoft Enterprise Global Payroll for Japan 8.9?

With deeper Japanese compensation practices and statutory requirements support, Global Payroll for Japan 8.9 aims to simplify your payroll setup and reduce the operating costs of your payroll operation.

In Global Payroll for Japan 8.9, we offer some new functions to simplify payroll administrative work:

- Support for multiple jobs.
- Social insurance features.
- Deeper localization support.

Support For Multiple Jobs

In Global Payroll for Japan 8.9, we streamline the process of managing the payroll for employees who receive compensation from multiple companies. We reduce the need to make manual adjustments and consolidations for payments.

Social Insurance Features

In release 8.9, Global Payroll for Japan offers several enhancements to simplify the administration of Social Insurance.

Simplifying Social Insurance Administration

On a regular basis, companies in Japan must submit various social insurance reports to the authorities. Global Payroll for Japan 8.9 delivers various social insurance statutory reports out of the box to streamline the data collection and filing process. For example:

- The social insurance authorities accept enrollment and change data such as Enrollment/Termination, Geppen/Santei, Bonus, and Address Change by electronic formats. Global Payroll for Japan 8.9 delivers these electronic formats to greatly simplify the filing process.

- Every month, the payroll department has to reconcile the monthly social insurance amounts from the payroll system to the premium contribution reports provided by the social insurance authorities. We provide the managerial reports to streamline the reconciliation process.

Deeper Localization Support

In Japan, other activities are managed by the payroll department on a less frequent basis. These include:

- Year-end adjustments.
- Retirement calculations.
- Commuting allowances.

PeopleSoft has studied the most common business practices and incorporated them into Global Payroll for Japan 8.9 to help our customers manage these processes efficiently. The result is less manual work and greater accuracy for your payroll and compensation data.

Year-end Adjustments

Global Payroll for Japan now has the ability to carry over the result of the Year-end Adjustments to the next year of the object year. The payment date must be in the object year. This allows the tax difference to be settled in the January salary of the next year. Positive amounts can be added to the January salary.

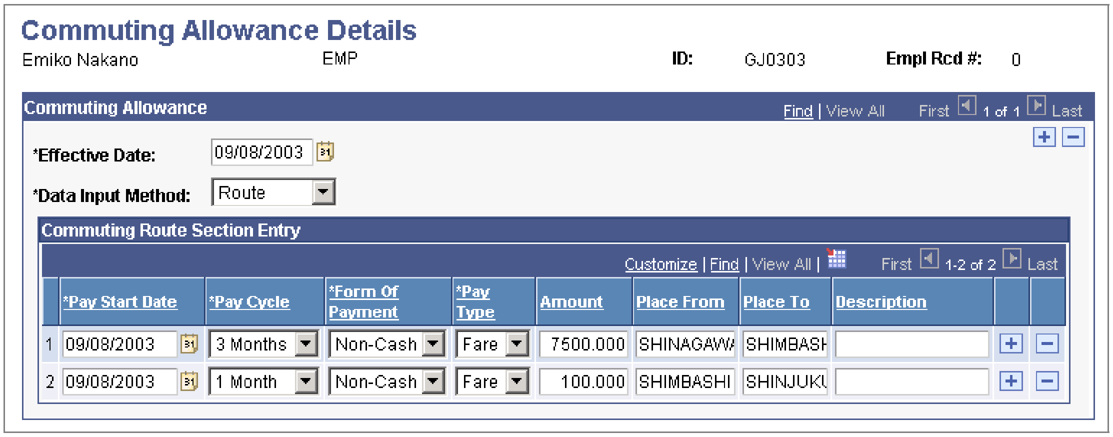
Retirement Allowance

PeopleSoft now delivers built in functionality for managing Retirement Allowance based upon legal requirements. Global Payroll for Japan enables you to calculate income and inhabitant tax based on the positive input amounts of retirement allowance and other payee specific data on the Retirement Allowance Payee Data page. You can also print retirement allowance data on several reports, such as the Withholding Tax report, the Withholding Tax Register, and the Legal Payment Summary report.

The system enables you to create calculation rules for Retirement Allowance amount based on various company-specific items such as service years, base pay amount, the reason of termination, and point system.

Commuting Allowance Enhancement

Global Payroll for Japan now enables you to record commuting allowances by total amount or by commuting route. The system enables you to enter an employee’s commuting allowance either as one total amount based on pay cycle, or as separate commuting amounts based on route.



You can now process an employee's commuting allowance by route

When recording allowances by route, the system enables you to select one pay cycle for each commuting route.

What's New in PeopleSoft Enterprise Global Payroll for Malaysia 8.9?

Making timely payments to your workforce while lowering your total cost of ownership is a business goal that your organization can achieve with Global Payroll for Malaysia. With Global Payroll, you have complete control over all aspects of your payroll operation, including statutory payroll and absence requirements.

Global Payroll for Malaysia offers several modifications to simplify payroll processing for your organization:

- Modifications to banking.
- Changes to manual and separate check processing.
- Modifications to application navigation.
- Modifications to reports.
- Modifications to online payslips.

See Also

What's New in PeopleSoft Enterprise Global Payroll 8.9?

Modifications to Banking

The country extension Run Payment Prep Process MYS page has been superseded by the Run Payment Prep Process page provided with the core Global Payroll application.

Changes to Manual and Separate Check Processing

Support for manual and separate checks is now provided by the new off-cycle payment feature. This feature is included with release 8.9 of the core Global Payroll application. For more information, see Off-Cycle Payroll Processing.

Modifications to Application Navigation

In release 8.9, navigation paths into Global Payroll have been changed as follows:

8.8 Navigation	8.9 Navigation
Global Payroll	Global Payroll & Absence Mgmt
Setup HRMS, Product Related, Global Payroll	Setup HRMS, Product Related, Global Payroll & Absence Mgmt

In addition, navigation paths to Global Payroll reports have been combined:

8.8 Navigation	8.9 Navigation
Global Payroll, Absence and Payroll Processing, Payroll Reports Global Payroll, Absence and Payroll Processing, Absence Reports	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Reports

Modifications to Reports

The Payee Message MYS report has been superseded by a messages report provided with the core Global Payroll application.

Online Payslips

With Global Payroll for Malaysia 8.9, you can generate PDF payslips that employees can view online if you purchase PeopleSoft Enterprise ePay.

Note. Online payslips are discussed elsewhere in this document.

See Also

What's New in PeopleSoft Enterprise ePay 8.9?

What's New in PeopleSoft Enterprise Global Payroll for Mexico 8.9?

Global Payroll for Mexico offers the following enhancement to simplify payroll processing for your organization:

- Online payslips

Online Payslips

With Global Payroll for Mexico 8.9, you can generate PDF payslips that employees can view online if you purchase PeopleSoft Enterprise ePay.

Note. Online payslips are discussed elsewhere in this document.

See Also

What's New in PeopleSoft Enterprise ePay 8.9?

What's New in PeopleSoft Enterprise Global Payroll for New Zealand 8.9?

Making timely payments to your workforce while lowering your total cost of ownership is a business goal that your organization can achieve with Global Payroll for New Zealand. With Global Payroll, you have complete control over all aspects of your payroll operation, including statutory payroll and absence requirements.

Global Payroll for New Zealand offers several modifications to simplify payroll processing for your organization:

- Modifications to banking.
- Changes to manual and separate check processing.
- Support for New Zealand Holiday Leave Act.
- Modifications to application navigation.
- Modifications to reports.
- Modifications to online payslips.

See Also

What's New in PeopleSoft Enterprise Global Payroll 8.9?

Modifications to Banking

The country extension Run Payment Prep Process NZL page has been superseded by the Run Payment Prep Process page provided with the core Global Payroll application.

Changes to Manual and Separate Check Processing

Support for manual and separate checks is now provided by the new off-cycle payment feature. This feature is included with release 8.9 of the core Global Payroll application. For more information, see Off-Cycle Payroll Processing.

Support for New Zealand Holiday Leave Act

The New Zealand Holidays Act 2003 replaced the previous legislation on April 1, 2004. For more information on this act, see http://www.ers.dol.govt.nz/holidays_act_2003/holidays_advance.html

Changes were required to our delivered customary rules to comply with the new Holidays Act. These changes were delivered in prior releases. The changes took into consideration the transition of the new Holidays Act; both the new and old rules were maintained in the system. The old rules became inactive after April 1, 2004. Starting with release 8.9, only the new rules are delivered with the application.

The main enhancement for 8.9 is the delivery of a new annual leave absence entitlement and take. The rule incorporates both pro-rata and entitlement in days held in custom accumulators with a begin date equal to Hire Date or Rehire Date. A Service date is defined as a supporting element on the absence entitlement, and this is used in the anniversary date calculation where the pro-rata balance is moved to entitlement.

Modifications to Application Navigation

In release 8.9, navigation paths into Global Payroll have been changed as follows:

8.8 Navigation	8.9 Navigation
Global Payroll	Global Payroll & Absence Mgmt
Setup HRMS, Product Related, Global Payroll	Setup HRMS, Product Related, Global Payroll & Absence Mgmt

In addition, navigation paths to Global Payroll reports have been combined:

8.8 Navigation	8.9 Navigation
Global Payroll, Absence and Payroll Processing, Payroll Reports Global Payroll, Absence and Payroll Processing, Absence Reports	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Reports

Modifications to Reports

The Payroll Messages Report AUS report has been superseded by a messages report provided with the core Global Payroll application.

Online Payslips

With Global Payroll for New Zealand 8.9, you can generate PDF payslips that employees can view online if you purchase PeopleSoft Enterprise ePay.

Note. Online payslips are discussed elsewhere in this document.

See Also

What's New in PeopleSoft Enterprise ePay 8.9?

What's New in PeopleSoft Enterprise Global Payroll for Singapore 8.9?

Making timely payments to your workforce while lowering your total cost of ownership is a business goal that your organization can achieve with Global Payroll for Singapore. With Global Payroll, you have complete control over all aspects of your payroll operation, including statutory payroll and absence requirements.

Global Payroll for Singapore offers several modifications to simplify payroll processing for your organization:

- Modifications to banking.
- Changes to manual and separate check processing.
- Modifications to application navigation.
- Modifications to reports.
- Modifications to online payslips.

See Also

What's New in PeopleSoft Enterprise Global Payroll 8.9?

Modifications to Banking

The country extension Run Payment Prep Process SGP page has been superseded by the Run Payment Prep Process page provided with the core Global Payroll application.

Changes to Manual and Separate Check Processing

Support for manual and separate checks is now provided by the new off-cycle payment feature. This feature is included with release 8.9 of the core Global Payroll application. For more information, see Off-Cycle Payroll Processing.

Modifications to Application Navigation

In release 8.9, navigation paths into Global Payroll have been changed as follows:

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Setup HRMS, Product Related, Global Payroll	Setup HRMS, Product Related, Global Payroll & Absence Mgmt

In addition, navigation paths to Global Payroll reports have been combined:

8.8 Navigation	8.9 Navigation
Global Payroll, Absence and Payroll Processing, Payroll Reports Global Payroll, Absence and Payroll Processing, Absence Reports	Global Payroll & Absence Mgmt, Absence and Payroll Processing, Reports

Modifications to Reports

The Payee Message Report SGP report has been superseded by a messages report provided with the core Global Payroll application.

Online Payslips

With Global Payroll for Singapore 8.9, you can generate PDF payslips that employees can view online if you purchase PeopleSoft Enterprise ePay.

Note. Online payslips are discussed elsewhere in this document.

See Also

What's New in PeopleSoft Enterprise ePay 8.9?

What's New in PeopleSoft Enterprise Global Payroll for Spain 8.9?

Global Payroll for Spain offers several enhancements to simplify payroll processing for your organization:

- IBAN
- Bank processing enhancements
- Online payslips

IBAN

As of January 1, 2004, IBAN must be used for all transfers out of Spain and for special transfers.

IBAN is an account number that uniquely identifies a bank account and is assigned according to ISO standards so that it can be used across national borders.

You can define IBAN information on the IBAN Country Setup page and Source Bank Account page.

Note. IBAN setup information is discussed elsewhere in this document.

See Also

What's New in PeopleSoft Enterprise Global Payroll 8.9?

Bank Processing Enhancements

The Global Payroll for Spain banking process has been enhanced to accommodate IBAN support. The new banking process is performed in the following way:

1. Payroll is finalized.
2. The core Banking Prep process is run. The payment status for selected payees is set to *P (*prepared) on the GP_PAYMENT table.
3. The core Banking Prep process is finalized. The payment status for selected payees is set to *F* (finalized) on the GP_PAYMENT table.
4. The EFT generation process for Spain is run. The EFT process selects the payees with a payment status of *F* from the GP_PAYMENT table and generates the flat file containing the transfers to be made.

There is no longer a separate country-specific banking process. Instead, Global Payroll for Spain uses the core Banking Prep process to run the banking process.

Online Payslips

With Global Payroll for Spain 8.9, you can generate PDF payslips that employees can view online if you purchase PeopleSoft Enterprise ePay.

Note. Online payslips are discussed elsewhere in this document.

See Also

What's New in PeopleSoft Enterprise ePay 8.9?

What's New in PeopleSoft Enterprise Global Payroll for Switzerland 8.9?

Making timely payments to your workforce while lowering your total cost of ownership is a business goal that your organization can achieve with Global Payroll for Switzerland. You have complete control over all aspects of your payroll operation, including statutory payroll and absence requirements.

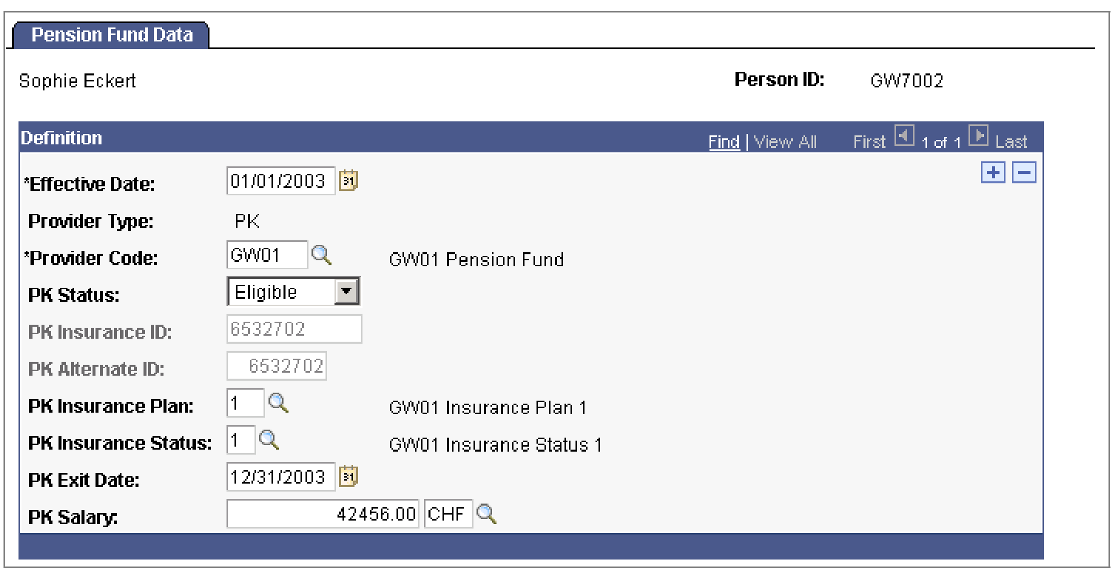
Global Payroll for Switzerland 8.9 offers several new features to simplify payroll processing for your organization:

- Pension interface (BVG)
- Banking enhancements
- Legislative reporting

Pension Interface (BVG)

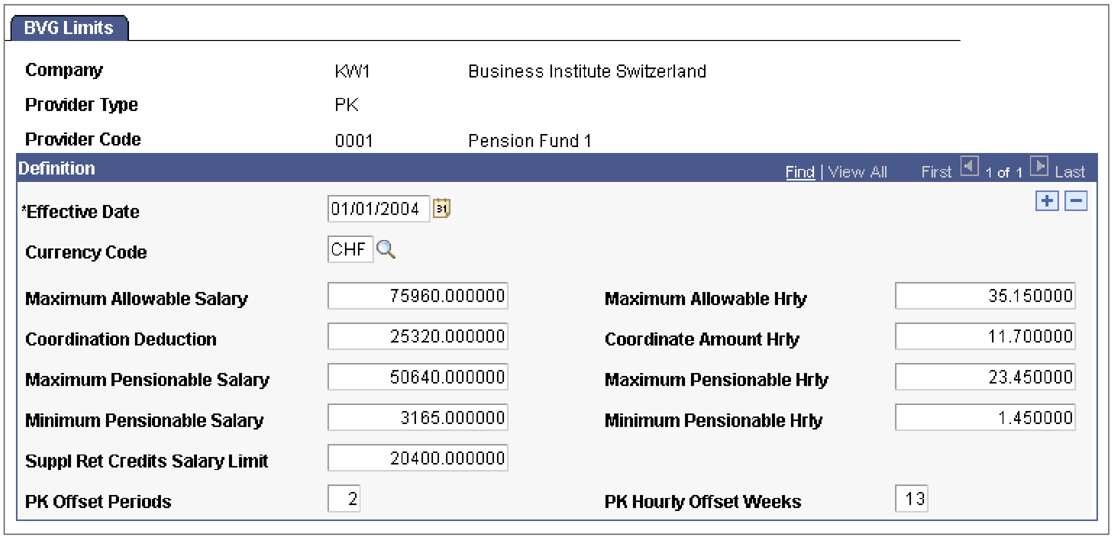
BVG, or Berufliche Vorsorge, is the mandatory Swiss occupational pension (old-age, death, and invalid) insurance. The objective of BVG is to complement the benefits of national social security to ensure the continuation of the accustomed standard of living. Employers that have employees who are subject to obligatory pension insurance must either establish a registered occupational benefits institution or affiliate with one. Customers currently must either implement their own pension functionality or integrate with a third-party provider.

Global Payroll for Switzerland 8.9 delivers a standard integration to the AG Büro 70 product PEKA® to make it easier for payroll managers to manage pensions. PEKA® supports pension calculations such as employer/employee contributions, payments, and adjustments. PeopleSoft reports pension gross salaries to PEKA®, which calculates the contributions and reports them back so that they can be deducted in payroll.



Use the Pension Fund Data page to make an employee eligible for BVG calculations

Besides the interface, Global Payroll for Switzerland 8.9 provides an internal solution to calculate pension contributions within payroll. To enable the internal calculation, you must select the population that will be affected, and enter the BVG definitions into the system.



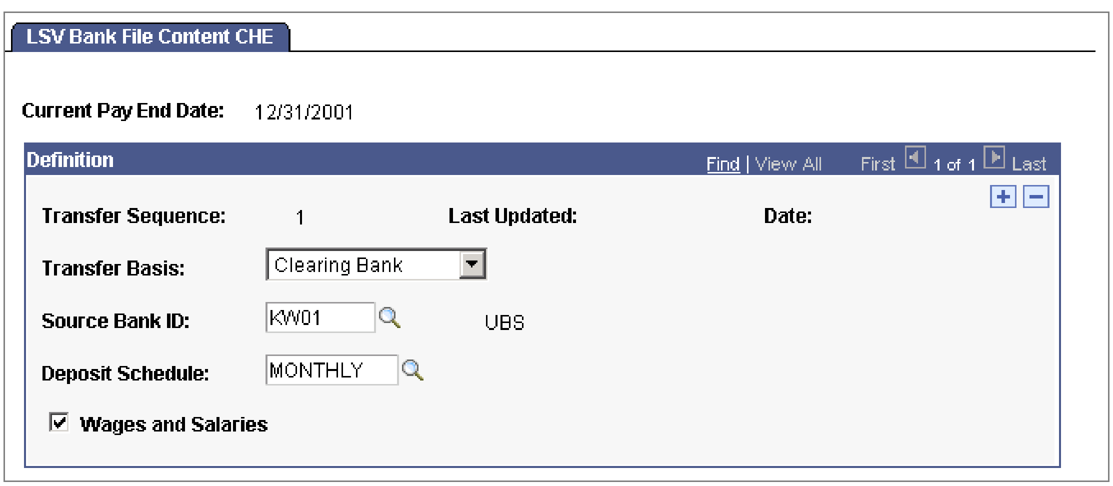
The BVG Limits page centralizes the data the system uses to calculate pension contributions internally

Banking Enhancements

Banking is a critical function of payroll processing. Global Payroll for Switzerland 8.9 delivers enhanced banking features.

Lastschriftverfahren (LSV)

LSV (Lastschriftverfahren, or direct debit facility) is an electronic payment transfer system in Switzerland. Global Payroll for Switzerland 8.9 supports direct debit bank transfers by generating an LSV file for negative payment amounts.



Define the contents of the LSV file on this user-friendly page.

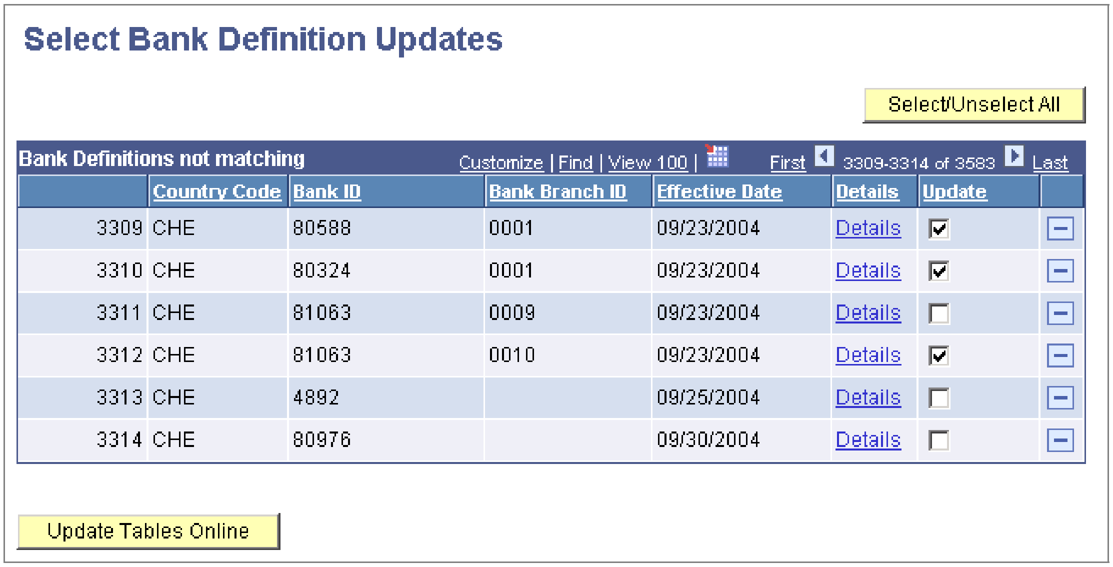
SIC Integration

Changes of bank codes happen quite frequently in Switzerland (about 50 to 100 changes per quarter). To facilitate the entry of these changes, Global Payroll for Switzerland 8.9 enables the direct download of bank information from the Swiss Interbank Clearing (SIC) website, which regularly publishes a text/Excel file with the most current bank information. You can opt to load the data directly from a local file or from a network location. Global Payroll for Switzerland 8.9 delivers a standard process to read the information from the SIC file and store the data in temporary tables.

The system enables you to review the new information before it is saved. You can compare the new and old date side by side.

Prior to updating the records, you can compare the SIC data with the data in your system.

Once you have reviewed the data, the system enables you to update your records with all of the new data, or selected entries.


Select Bank Definition Updates

Select/Unselect All

Bank Definitions not matching — Customize | Find | View 100 | First 3309-3314 of 3583 Last

	Country Code	Bank ID	Bank Branch ID	Effective Date	Details	Update	
3309	CHE	80588	0001	09/23/2004	Details	☑	−
3310	CHE	80324	0001	09/23/2004	Details	☑	−
3311	CHE	81063	0009	09/23/2004	Details	☐	−
3312	CHE	81063	0010	09/23/2004	Details	☑	−
3313	CHE	4892		09/25/2004	Details	☐	−
3314	CHE	80976		09/30/2004	Details	☐	−

Update Tables Online

The system enables you to update individual bank definitions

IBAN Banking

Global Payroll for Switzerland 8.9 supports the IBAN banking format for international bank transfers. IBAN is the standard format for intercountry payment transfers within the EU.

See Also

What’s New in PeopleSoft Enterprise Global Payroll 8.9?

Legislative Reporting

PeopleSoft is committed to helping customers to meet their statutory reporting requirements in the different Swiss cantons. When you run the Source Tax Year report, the system automatically creates the version of the report specified by the Canton you specify on the run control page.

Global Payroll for Switzerland 8.9 delivers the Attestation Quittance for Geneva, d’Impot a la Source for Waadt, and Attestato-Ricevuta for Tessin.

TRATTENUTA DELL'IMPOSTA ALLA FONTE SULLE PRESTAZIONI VERSATE AI SALARIATI

ATTESTATO - RICEVUTA ANNO 2004

1. Contribuente assoggettato all'imposta alla fonte **No AVS:** *623.40.379.000*
No RCS:

Cognome	*GW0130LU*	Nome	*Luzerner*
Domicilio Via/no	*Industriestr.15*	Località	*8066 Volketswil*
Luogo di lavoro: Comune	*Arbedo-Castione*	Cantone	*Tessin*
Data di nascita	*17.09.1940*	Numero figli	dal
Stato civile	*Celibe/Nubile*	dal *01.01.2004*	
Cognome/nome del coniuge		lo stesso lavora in Svizzera	si no

....

You can print the Attestato-Ricevuta for employees residing in Tessin

What’s New in PeopleSoft Enterprise Global Payroll for the Netherlands 8.9?

Global Payroll for the Netherlands 8.9 has enhancements in these areas:

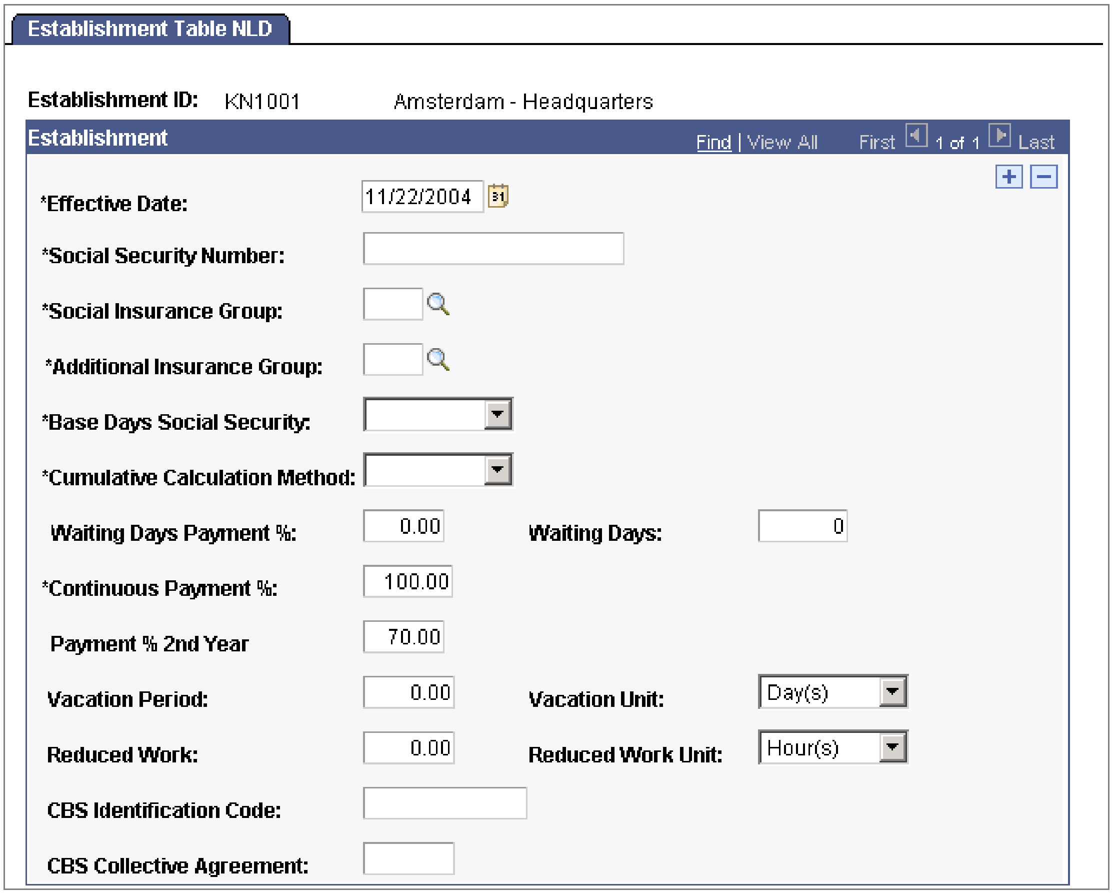
- CBS interface.
- Payroll exception register report.
- Online payslips.

CBS Interface

The Dutch Central Bureau of Statistics (Centraal Bureau voor de Statistiek) requires employers to report wage and employment statistics at regular intervals.

With Global Payroll for the Netherlands 8.9, the CBS Interface enables you to generate this information based on your payroll results. Run the report monthly, 4 weekly or quarterly, according to your organization’s payroll schedule.

To support the CBS interface, the Establishment Table NLD page now includes two new fields for recording your organization's CBS identification code and CBS collective agreement numbers:



Establishment Table NLD page

Payroll Exceptions Register Report

The Payroll Exceptions Register (Standenregister) report (GPNLPREG) provides a comparison of the payroll results of two pay periods. It's a valuable tool for auditing and examining payroll results in different pay periods. The report lists totals for earning, deduction, and accumulator elements depending on the criteria you select.

The differences are summarized at the employee or company level where the differences are equal to or greater than a user-defined percentage. Here is a sample of the new report:

Payroll Exceptions Register
Periods KN2004M01 & KN2004M02
Filter By Company - Insurance Institute Netherland
Elements Earnings & Deductions

Maarschalkerweerd, Guido **KNG001**

Element Name	Element Type	Period 1	Period 2	Percentage	Deltas	Recalc. Prev. Periods
Regular Tax	Deduction	2.050,77	2.050,77			
Non Regular Tax	Deduction		260,00	100,00		
Labour Tax Reduction	Deduction	101,08	101,08			
Salary	Earnings	5.800,00	5.800,00			
Union Contribution	Deduction	2,75	2,75			
Bonus	Earnings		500,00	100,00		
Private Medical Allowance	Earnings	70,00	70,00			
Regular Reimburse	Earnings	100,00	100,00			
Private Medical Insurance	Deduction	140,00	140,00			
WW Employee NT	Deduction	138,03	138,03			
PENS Employee NT	Deduction	157,92	157,92			
PREP Employee NT	Deduction	54,31	54,31			
WAOH Employee NT	Deduction	17,36	17,36			
WW Employee NT	Deduction	174,92	174,92			
WAO Employee NT	Deduction	185,95	185,95			
PENS Employee NT	Deduction	421,12	421,12			
PREP Employee NT	Deduction	217,23	217,23			
WAOH Employee NT	Deduction	52,07	52,07			
WW Employee NT	Deduction	47,40	47,40			
WAO Employee NT	Deduction	36,46	36,46			
Employee Totals	**Maarschalkerweerd, Guido**	**9.767,37**	**10.527,37**	**200,00**		

Sample of the Payroll Exceptions Register report

Online Payslips

With Global Payroll for the Netherlands 8.9, you can generate PDF payslips that employees can view online if you purchase PeopleSoft Enterprise ePay.

Note. Online payslips are discussed elsewhere in this document.

See Also

What's New in PeopleSoft Enterprise ePay 8.9?

What's New in PeopleSoft Enterprise Global Payroll for the U.K. 8.9?

Global Payroll for the U.K. uses the rules engine to deliver a payroll that provides superior flexibility. The United Kingdom country extension provides all the statutory rules that you need to comply with Inland Revenue requirements including the latest electronic filing formats. You can use the same engine to tailor the application to include your specific pay rules. With no need to clear data at tax year end, you can report on pay information over any length of time, whether to coincide with your accounting year or an accumulation over several years.

In HRMS 8.9, there are significant enhancements to Global Payroll for the U.K. in the following areas:

- Ease of use.
- Simplified implementation.
- Additional functionality.

Ease of Use

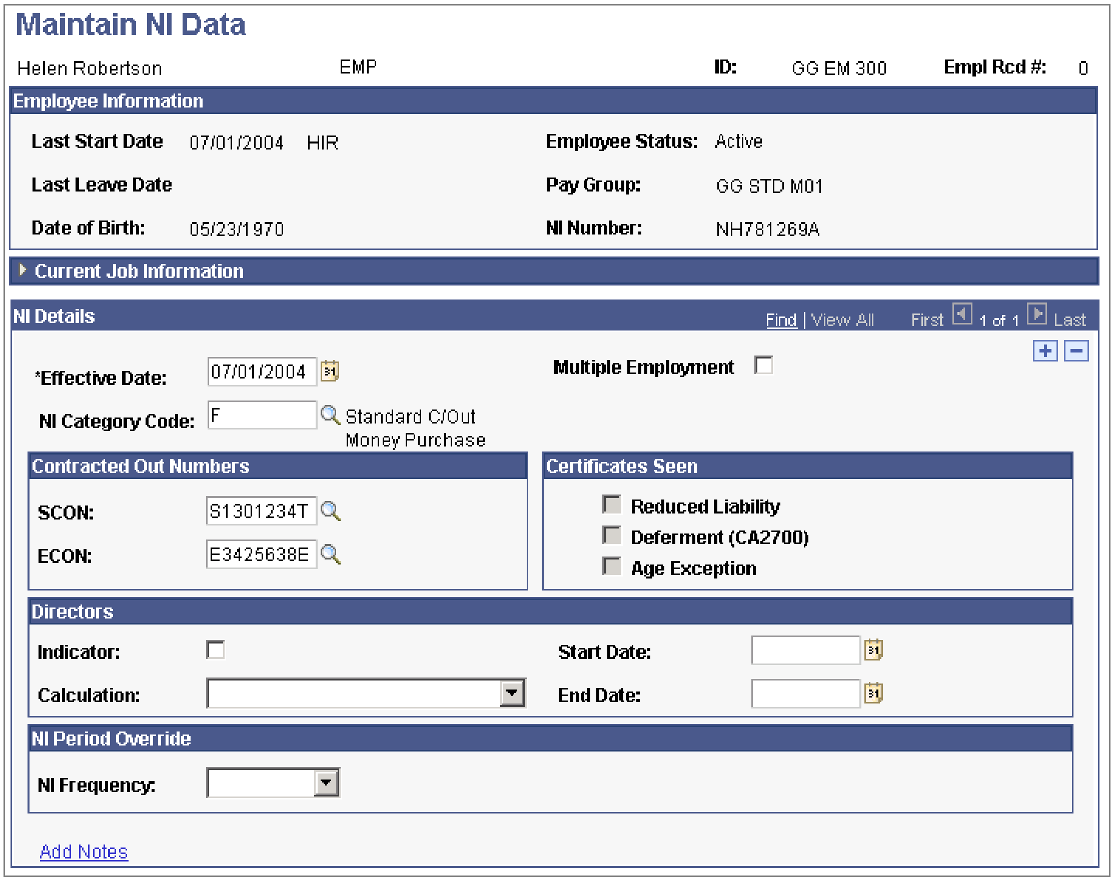
Global Payroll for the U.K. 8.9 includes features that make it easier for payroll administrators to manage and process payroll. Input errors are reduced with the increased validation on the Statutory Details pages. Improved preprocessing reporting highlights errors before the pay process is run.

Redesign of the Statutory Details Pages

The Statutory Details pages are used regularly for all employees. Correct data input is critical to making correct pay calculations. In HRMS 8.9, we have enhanced entry of tax and national insurance details, including redesign of the effective date coverage of Tax and National Insurance (NI) information by creating separate effective dates for each.

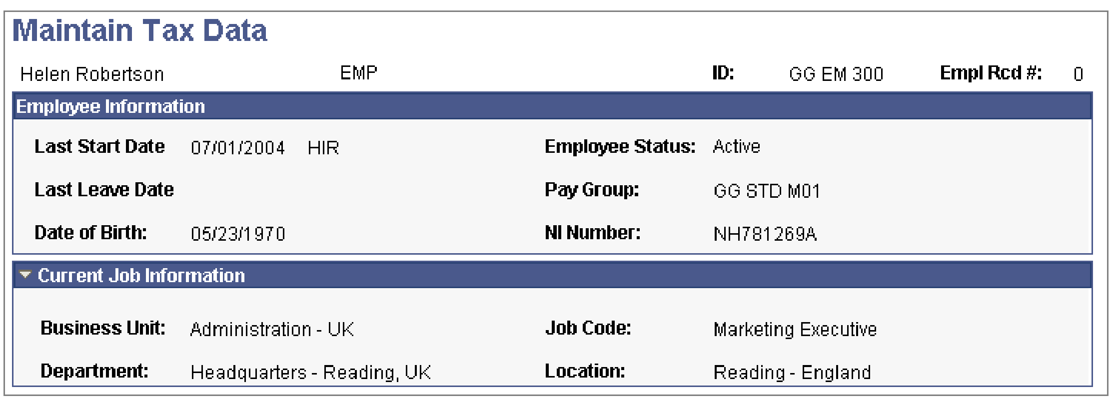
Creating two distinct effective dates for Tax and NI required us to change the Statutory Details pages, so we have used this opportunity to enhance the usability of these pages. A new subpage displays revised header details, including Employee Job details and National Insurance Number. The new subpage provides all the basic employee information on one page for the payroll administrator. This subpage is used across the Tax and NI pages and also the Tax Credits and Student Loans pages for consistency.

Data input validation has been enhanced to reduce errors within the new Maintain NI Data page. This includes additional messages to improve both usability and data accuracy as well as look-up facilities for ECON and SCON.

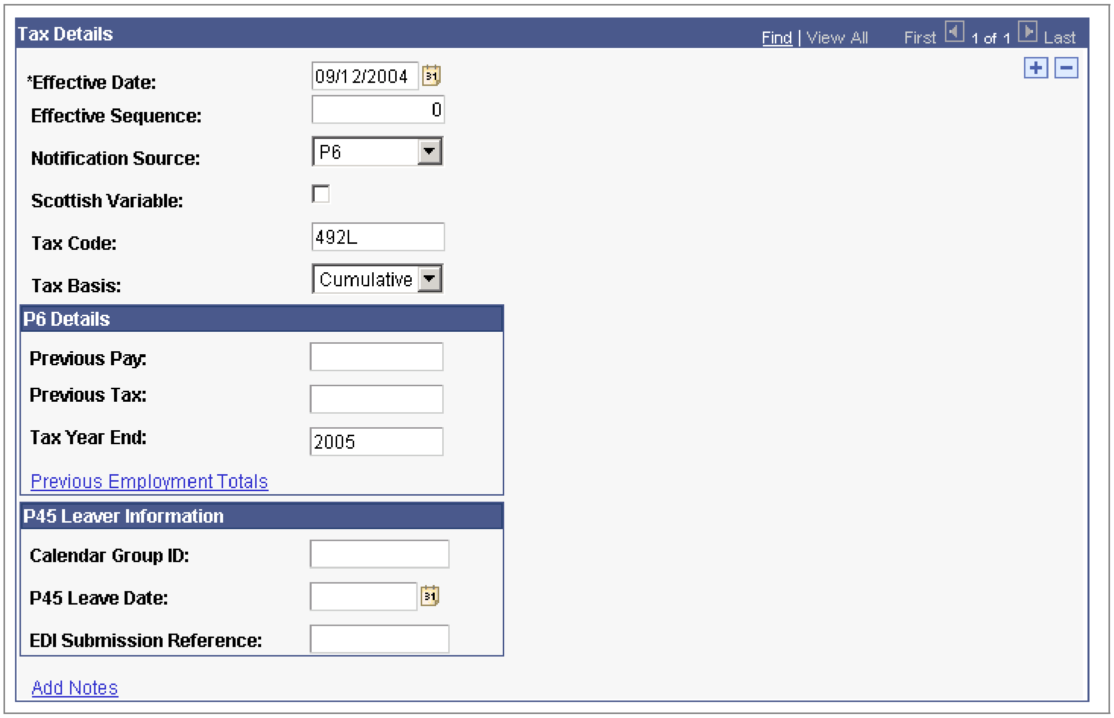


New Maintain NI Data page

The Maintain Tax Data page has been enhanced to enable multiple tax notifications with the same effective date as well as the ability to record and process multiple previous employment notifications within a single period of employment.



Redesigned Maintain Tax Data page (1 of 2)



Tax Details — Find | View All — First 1 of 1 Last

*Effective Date: 09/12/2004

Effective Sequence: 0

Notification Source: P6

Scottish Variable:

Tax Code: 492L

Tax Basis: Cumulative

P6 Details

Previous Pay:

Previous Tax:

Tax Year End: 2005

Previous Employment Totals

P45 Leaver Information

Calendar Group ID:

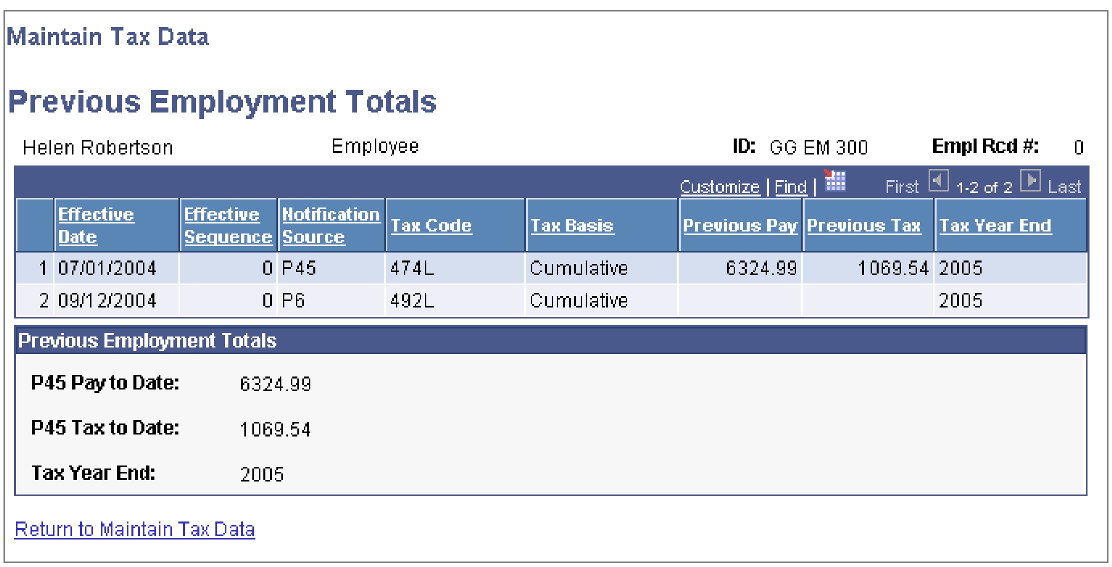
P45 Leave Date:

EDI Submission Reference:

Add Notes

Redesigned Maintain Tax Data page (2 of 2)

A new Previous Employment Totals link on the Maintain Tax Data page provides a view of consolidated taxable pay and tax information associated with the tax year and period of employment. The system calculates the total tax and pay for the tax year based on the previous employment (P45 and P6) values that you have entered for the payee.



Maintain Tax Data

Previous Employment Totals

Helen Robertson — Employee — ID: GG EM 300 — Empl Rcd #: 0

Customize | Find | — First 1-2 of 2 Last

	Effective Date	Effective Sequence	Notification Source	Tax Code	Tax Basis	Previous Pay	Previous Tax	Tax Year End
1	07/01/2004	0	P45	474L	Cumulative	6324.99	1069.54	2005
2	09/12/2004	0	P6	492L	Cumulative			2005

Previous Employment Totals

P45 Pay to Date: 6324.99

P45 Tax to Date: 1069.54

Tax Year End: 2005

Return to Maintain Tax Data

New Previous Employment Totals page lists pay and tax for the tax year

Pre and Post Payroll Processing Reports

Payroll managers need to check for errors in payroll data and correct these errors before the pay calculation process is run whenever possible. The more accurate the pay data is at process run time, the fewer adjustments payroll managers must make and the sooner the pay calculation can be finalized. Because some errors can only be identified once pay is calculated, further validation and identification of exceptions is also required once the initial payroll calculation has been processed. Mistakes or omissions in pay data must be highlighted throughout the tax year so that there is ample opportunity to make corrections before the critical year-end period, when time is short.

Global Payroll for the U.K. 8.9 delivers reports that can be run before and after the payroll has been calculated to make data checking much easier for payroll managers. These checks include:

- Employees without statutory details entered.
- Invalid NI category for employees who have reached retirement age.
- Zero gross or net pay.

Global Payroll for the U.K. 8.9 provides these two new payroll validation and exception reports:

- The Validation Exception (payroll) report (GPGBPVE) is a general report that validates all employees.
- The Validation Exception (starters and leavers) (GPGBSVE) is a separate report for specific checks relating to starters and leavers.

These reports can be run before or after you process your payroll, depending on the information you want to validate. Full validation is only possible when the payroll has been processed.

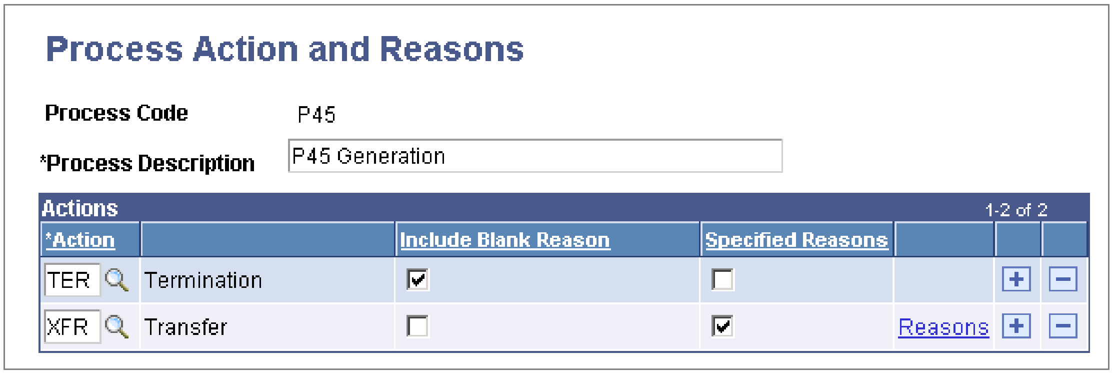
Global Payroll for the U.K. 8.9 also provides two new element summary reports:

- The Element Summary (period) report (GPGBEPTD) provides element total details grouped by category.
- The Element Summary (year to date) report (GPGBEYTD) a year-to-date element reconciliation report.

Improved Identification of Starters, Leavers, and Transfers

Many of our customers are large global corporations that have employees who transfer frequently between different locations—not only across the U.K. but also abroad. These transferring employees must be terminated from the U.K. pay system when they leave the U.K. The company is required to issue a P45 (statement of earnings) to the employee and the Inland Revenue. In most payrolls, companies can terminate the employee record, but global organizations that have single instances of their HR and payroll databases need to have just one record for an employee that covers that employee’s total employment with the company. It is therefore essential to be able to terminate the employee from the U.K. payroll without ending that employee’s company HR record.

Similarly, when employees transfer back to the U.K. following a period of employment overseas, they should be treated as a starter in payroll. With Global Payroll for the U.K. 8.9, you select the Human Resources Job Data action/reason codes that should trigger a P45 and those that trigger starter processing. A new Process Action and Reasons page enables you to specify the action and reason codes for your organization:



Process Action and Reasons page

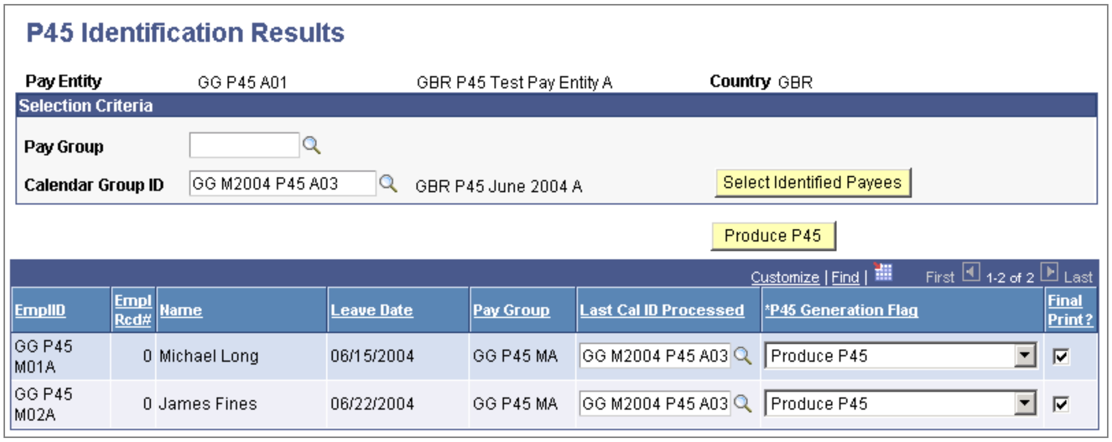
PeopleSoft delivers two process codes for this page, ***P45*** for P45 generation and ***P01*** for starter identification. When you run the P45 process, the system identifies payees with job data entries that match those you selected on the Process Action and Reason page.

Starters are identified during the normal payroll process. When the process encounters a starter, it creates a set of accumulators for the new period of employment.

Redesign of P45 Functionality

Global Payroll for the U.K. 8.9 gives you greater control of the P45 process. With our new configurable design, you select the Human Resources Job Data action/reasons codes that trigger a P45 for your employees.

A new P45 Identification process identifies employees who are awaiting issue of a P45, based on your P45 action/reason selections. The parameters for this process are more flexible, enabling you to process P45s for a pay entity, pay group, or calendar group within a selected date range. You can view the results of the identification process and make adjustments to the payee list before generating the P45s.



New P45 Identification Results page

From the new P45 Identification Results page, you can:

- Suspend P45 production for individual payees.
- Change the calendar ID, for example, if there is an adjustment to payee payroll processed in a supplementary payroll.
- Remove payees from the list.

The Produce P45 button enables you to print P45s for payees you have identified.

Simplified Implementation

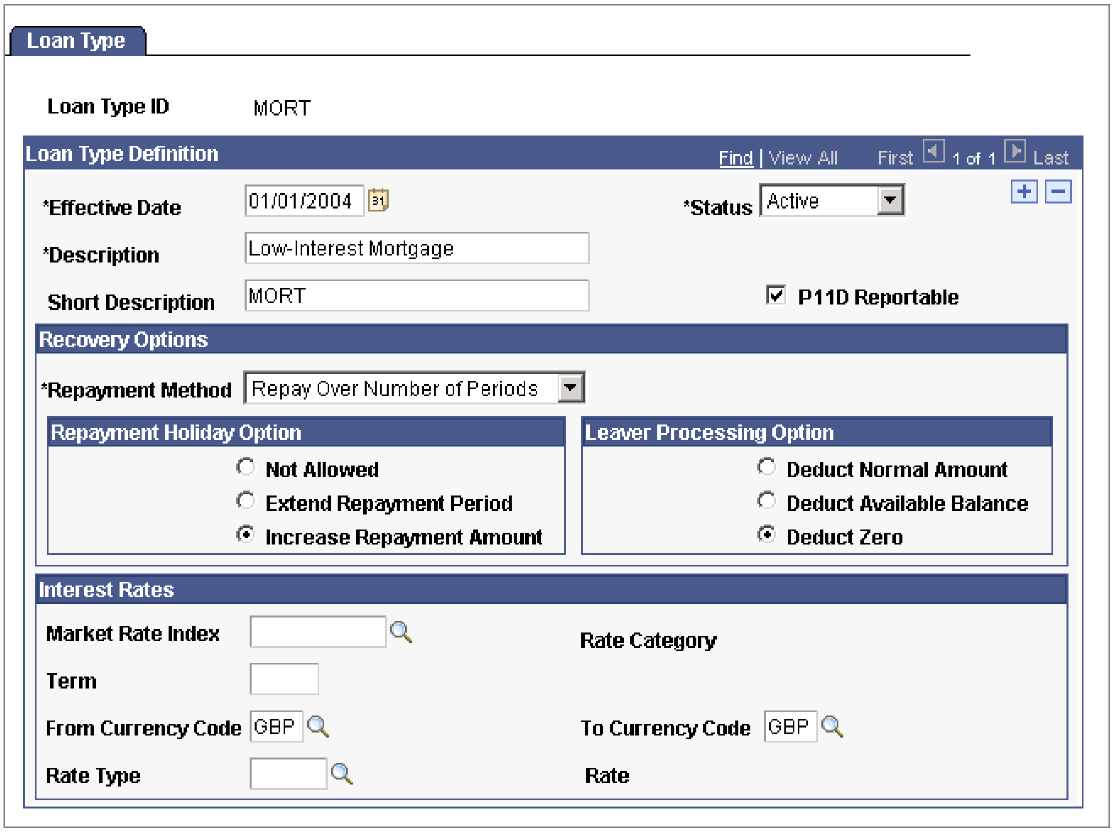
The Global Payroll rules engine allows customers to define any number of rules that they require to calculate their payroll for their unique requirements. Some rules, although not part of statutory requirements for all organizations, are commonly used by the majority of customers. If it is possible to deliver some of these commonly used rules in a flexible format, customers do not have to write them during the implementation, and the time and the cost to implement is reduced.

Enhancements to Loans Administration

The loans administration functionality has been redesigned in Global Payroll for the U.K. 8.9 to provide sophisticated loan setup and enhanced processing features.

The new Loans Administration functionality in Global Payroll for the U.K. 8.9 provides flexible rules for the repayment of loans. These enhancements provide an easy-to-use input page for payroll administrators and the information that they need to quickly answer employee queries on their loan repayments.

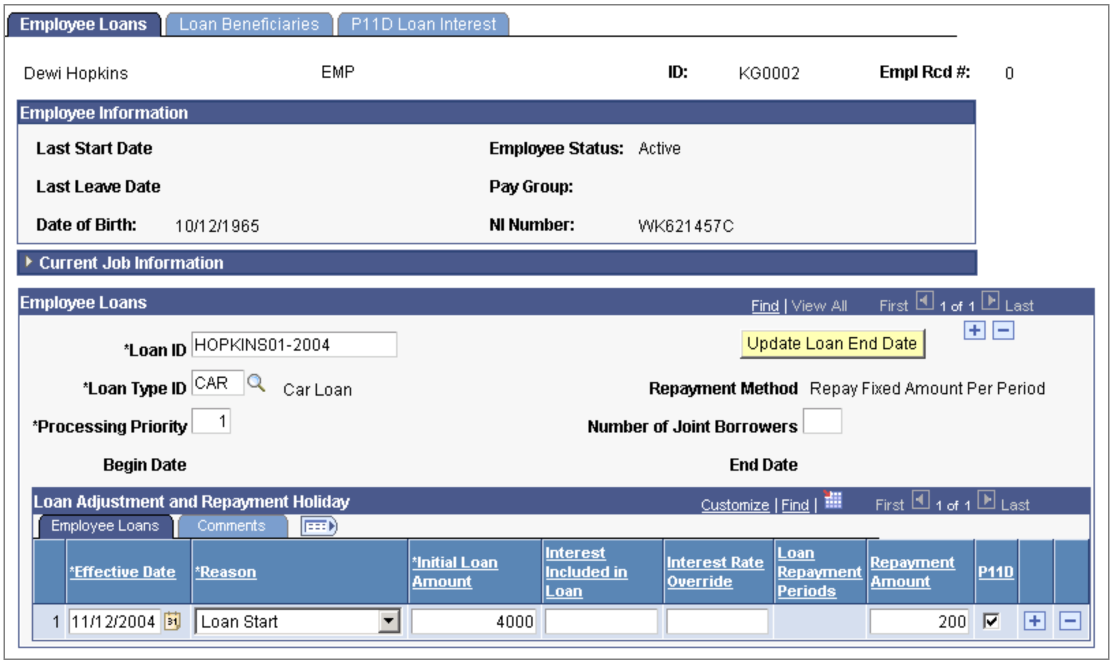
A new setup page gives you the ability to establish loan types and rules for your organization.



Loan Type page

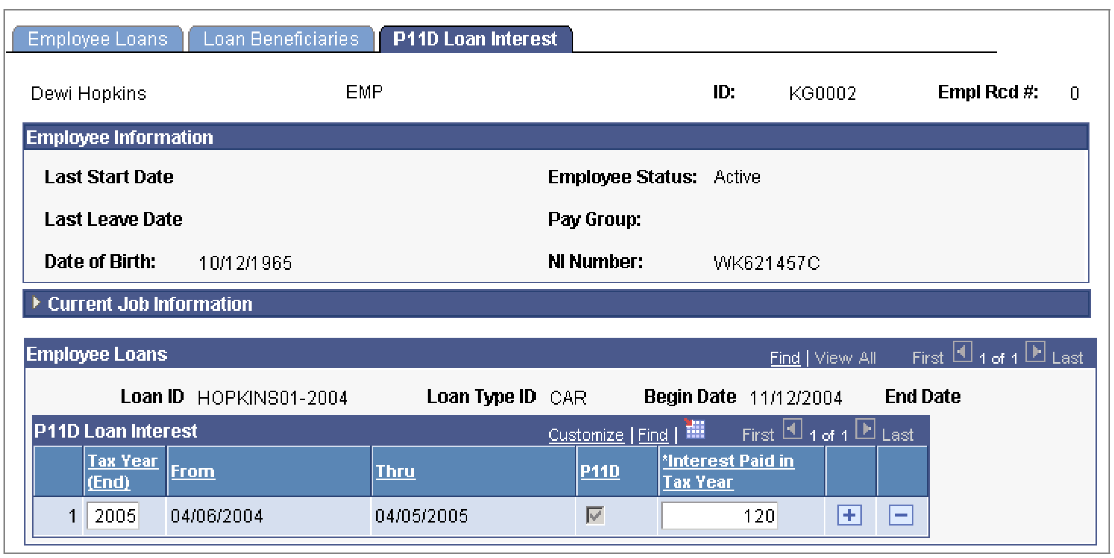
For each loan type, you define how the loan is repaid, rules for processing leavers and repayment holidays, the interest rate for the loan type, and whether the loan is P11D reportable.

A new Maintain Loans GBR component replaces the existing Employee Loans page. Using the new pages you can enter loan details, make adjustments to existing loans, and track repayment holidays, according to the rules for that loan type. The new functionality enables employees to have more than one concurrent loan of the same type.



Employee Loans page

Additional pages enable you to record loan beneficiaries and enter interest paid for P11D reporting. The new P11D data extract tool automatically extracts this information for inclusion in the payee's P11D report.



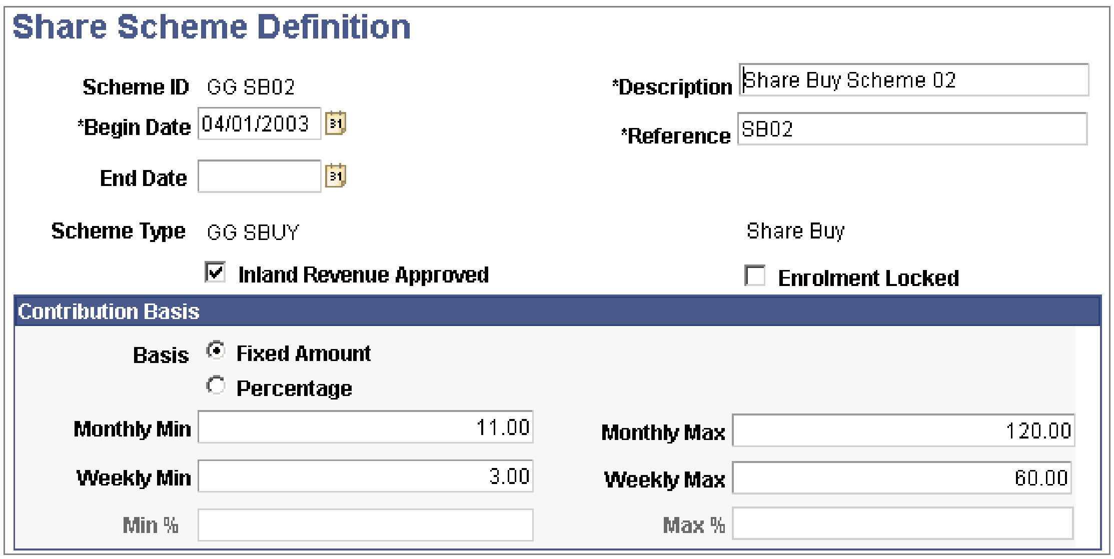
P11D Loan Interest page

The Review Loans page shows total loan amounts, total deducted to date, and outstanding balances for each of the loans along with the Loan Stop Date when loan recovery is complete.

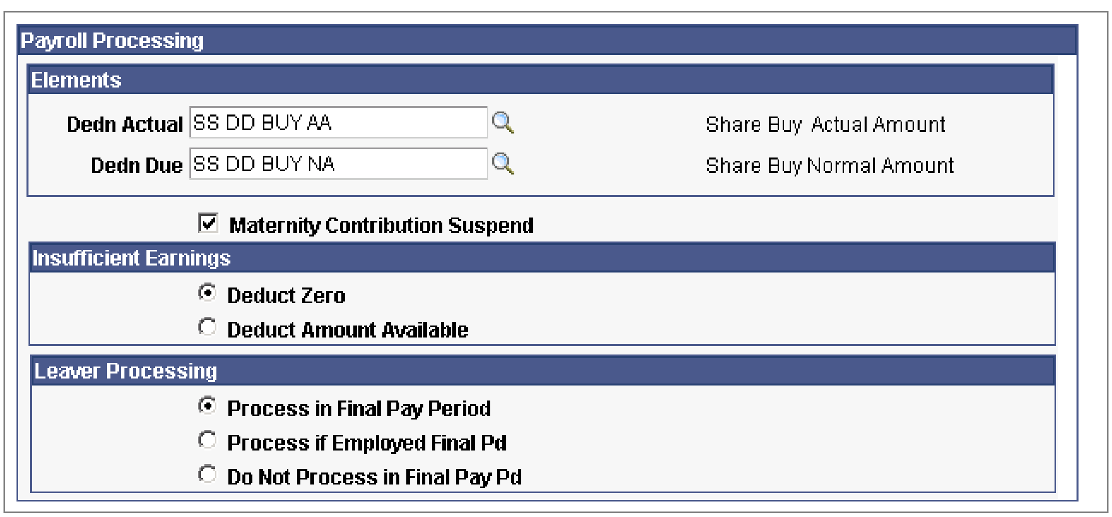
SAYE Administration

Many organizations in the U.K. operate Save as You Earn (SAYE) including Share Save and Share Buy schemes. The rules that are associated with SAYE are complex; they vary according to the type of scheme and how long the employee is part of the scheme. Defining the rules for SAYE can take a long time during implementation and requires detailed knowledge of the workings of the tax and NI calculation rules. Delivering the SAYE rules with Global Payroll for the U.K. 8.9 reduces the rules build process as part of implementation.

Global Payroll for the U.K. 8.9 delivers new setup pages that enable you to easily and quickly define multiple share schemes for your organization. Initially, you define share scheme types (share buy or share save) and the minimum and maximum contributions allowed for each share scheme type. Once share scheme types and limits are in place, you assign share scheme IDs.



Share Scheme Definition page (1 of 2)

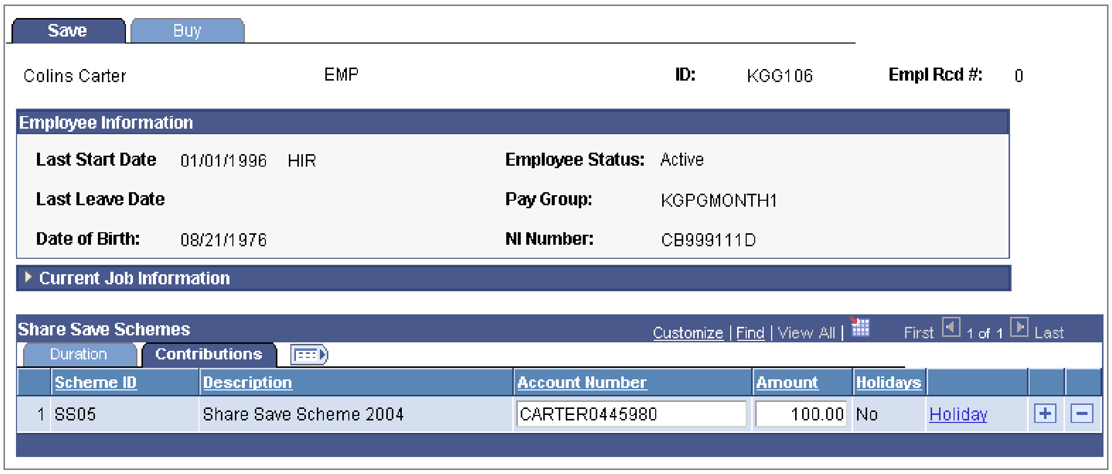


Share Scheme Definition page (2 of 2)

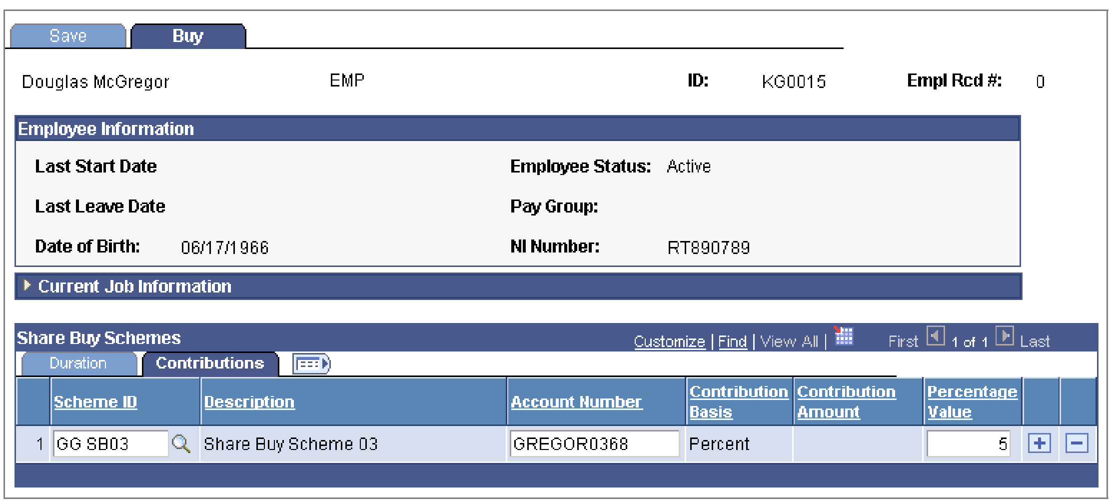
Using the Share Scheme Definition page, you can define:

- Duration of the scheme.
- Minimum and maximum limits for contributions.
- Contribution basis (percentage or a fixed amount).
- Deduction elements used for share scheme contributions.
- Payroll processing rules for payees with insufficient earnings and leavers.

For employees who sign up for Share Save or Share buy schemes, you can record the share scheme ID, the period the employee contributes to the scheme, the contribution amount or percentage, and the account number assigned to the employee by your third-party share scheme administrators.



Enrolling Payees in Share Save Schemes



Enrolling Payees in Share Buy Schemes

A Share Save Contribution Holiday page enables you to record details of breaks in contribution where these are allowed by the rules of the Share Save scheme.

Additional Functionality

Other new functionality delivered with Global Payroll for the U.K. 8.9 includes:

- A new data extract tool for P11D reporting using third-party software.
- Banking enhancements.

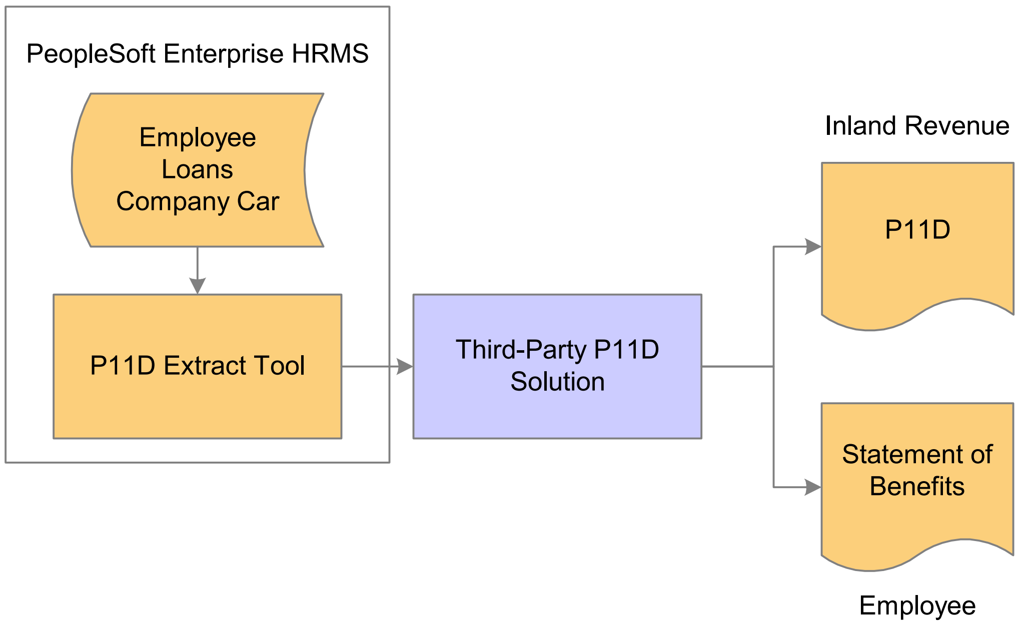
P11D Data Extract

All U.K. employers are required to report on taxable benefits to the Inland Revenue (P11D/P9 reports) and to provide this information to employees each year. These reports are complex to administer, and the requirements change frequently. Data required for the report comes from multiple sources, including HR, benefits, payroll, expenses, and finance. Any help with the production of this report reduces the workload for payroll administrators.

Customers previously defined their own P11D report or the extract file for export to a third-party software provider.

Global Payroll for the U.K. 8.9 delivers a data extract tool that streamlines this process and enables you to take the data that is held in PeopleSoft Enterprise Human Resources and Global Payroll to various third-party P11D solutions.

We have identified fields and records across the PeopleSoft Enterprise HRMS product line that are reportable for P11D calculations; these are company car details within Human Resources and beneficial loans within Global Payroll. However, we recognize that customers may have customized or added fields in Human Resources, or payroll elements in Global Payroll, that must be included in the P11D report. We therefore deliver a generic means of extracting data from Human Resources and Global Payroll that enable our customers to add customized fields, records, or payroll elements to the extract file. Payee details are extracted for all directors and employees who have data held in Human Resources or Global Payroll for any P11D section of the report.



P11D Production process

Global Payroll for the U.K. 8.9 delivers a configurable solution for identifying and extracting P11D data. The delivered solution has these key features:

- Customizable data mapping.

  New setup pages enable you to map PeopleSoft fields to third party P11D solutions. This open architecture means that you can configure the system for your choice of third-party vendor.

- User-definable data extract types.

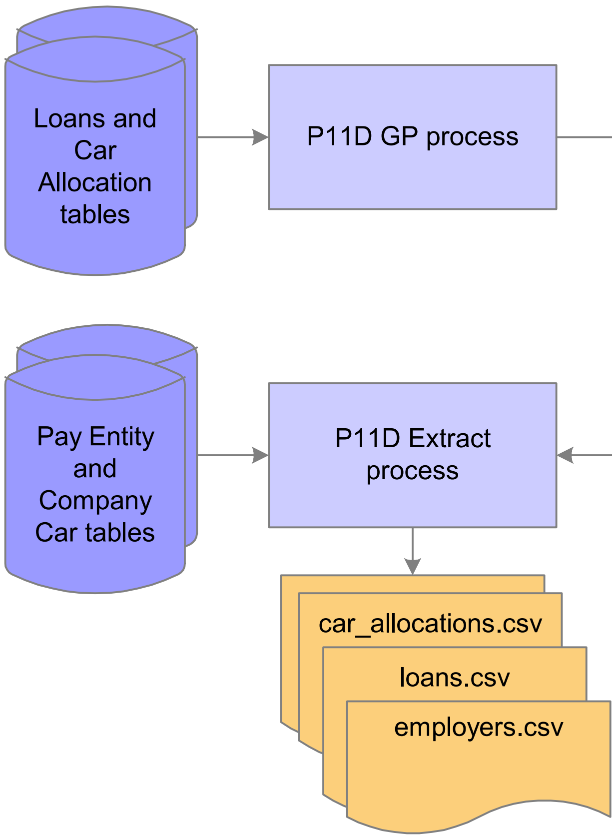
  PeopleSoft's delivered solution extracts employee loan and company car information, based on our delivered extract types. But we provide the ability to set up your own extract types. If you have customized your system you can expand the data extract to include other benefits information stored in your PeopleSoft database.

- A P11D process.

  P11D information is processed using the normal Global Payroll run control page. PeopleSoft delivers the processing structure - run type, process list, and sections – required to process P11D information. All of these elements are customer maintained.

- A P11D extraction process.

  This Application Engine process uses the results tables populated by the P11D process to create the CSV extract files that are imported into the third-party P11D solution.



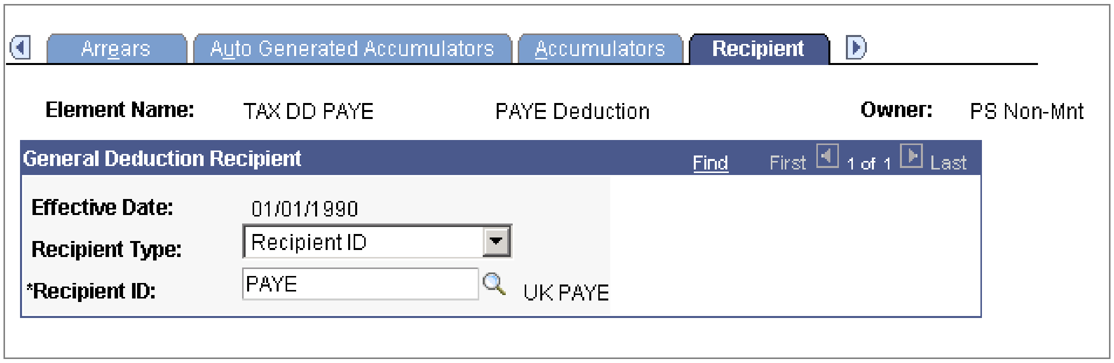
P11D Processes

Enhanced Banking

Many of the deductions that are processed within payroll have to be paid over to third-party organizations. Depending on the deduction, single payments may be required for the total deduction amount processed within the payroll, or alternatively separate payments for individual employees. Production of these payments using the enhanced banking functionality reduces payroll administration.

PeopleSoft Global Payroll for the U.K. 8.9 gives you greater flexibility to process payments other than net pay using the automated banking process. Deduction recipient functionality can be deployed to create BACS payments for the various deductions processed within payroll such as tax, NI, pensions, share schemes, and court orders. Depending on the deduction type, assign deduction recipients to deductions or at the payee level.

Recipients that are common to all payees are assigned at the deduction level.



Assigning a deduction recipient to a deduction

For recipients that vary by payee, the recipients are assigned at the payee level.

Assigning a deduction recipient to a payee

Global Payroll for the U.K. 8.9 also provides two new BACS reports:

- The BACS Net Payment List report (GPGBEFTP)
- The Net Payment Summary report (GPGBEFTS)

These provide details of BACS payments by employee and BACS payments by Sort Code.

Plan, Incent, Reward Enhancements

What motivates your workforce to deliver its best? Rewards. But not everyone is motivated by the same types of compensation. That's why PeopleSoft is the only vendor to offer a truly comprehensive and integrated compensation solution suite that maximizes efficiency, reduces costs, and increases workforce performance. From salary to pension and benefits to incentives, organizations can not only plan their total reward strategies but also monitor and measure those strategies to determine their effectiveness in aligning the workforce with business objectives.

What makes PeopleSoft unique in this arena? We are the only vendor to provide a single, integrated platform across all elements of compensation. PeopleSoft's compensation solution suite enables you to easily add modules as your compensation strategy expands or shifts. Solutions include benefits, stock, pension, base and variable pay, incentives, flexible spending accounts, and paid time off. And PeopleSoft is the only vendor to offer comprehensive compensation, performance management, and learning management solutions on the same proven, integrated platform.

What's New in Benefits for PeopleSoft Enterprise 8.9?

Skyrocketing benefits costs are affecting employers on many levels. Companies are forced to reduce costs or risk hits to their bottom line. Meanwhile, to recruit and retain top talent, companies realize that they must offer comprehensive benefit plans. But how can they do this and still meet revenue expectations?

PeopleSoft's Enterprise benefits solutions—Benefits Administration and eBenefits—help organizations reduce the administrative time and costs associated with today's complex benefit plans.

To help our customers more effectively administer and deliver benefits to their workforce, we have made many significant enhancements to the capabilities of the Human Resources Base Benefits business process. These changes were made as a result of feedback from benefits customers and user groups about features and functions that would most significantly help them reduce costs and streamline processes.

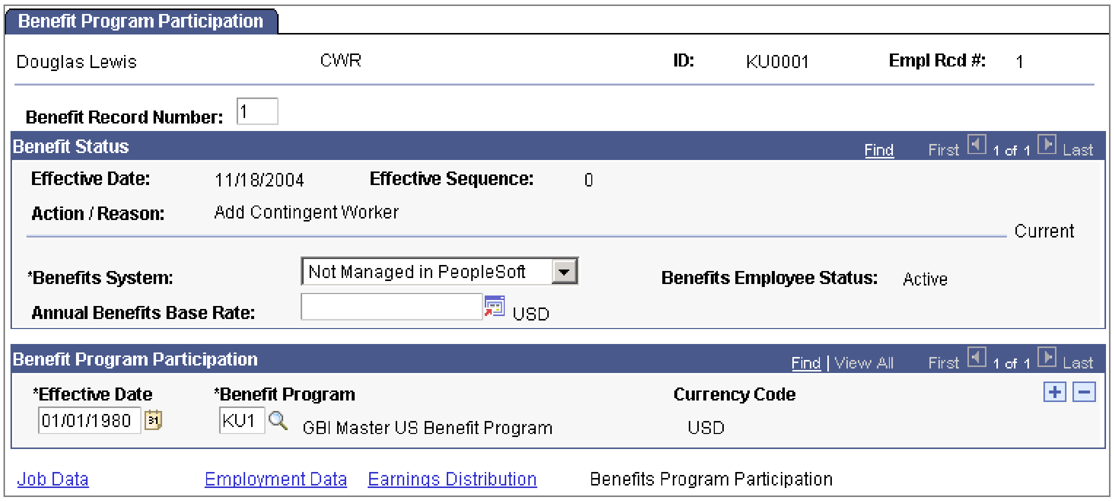
These enhancements help organizations to:

- More efficiently manage dependents and beneficiaries.
- More flexibly administer plans by using a variety of annual base benefit rates.
- Better comply with ERISA regulations.

Impact of the Person Model on Benefits

Benefit System Options

To enable our customers to track and separate employees, contingent workers, and persons of interest within Benefits, there is an additional option of ***Not Managed in PeopleSoft*** for the Benefits System field on the Benefit Program Participation page.



Benefit Program Participation page

Select ***Not Managed in PeopleSoft*** (benefits managed by a system other than PeopleSoft) to filter out persons who have insufficient employment and job information to support benefit enrollment.

Dependent/Beneficiary Enhancements

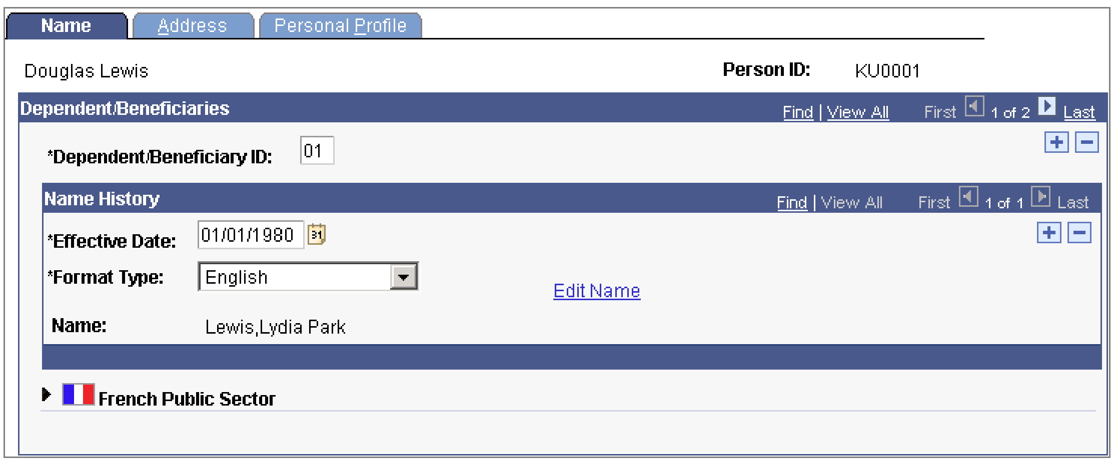
Accurate information on dependents and beneficiaries is critical for the effectiveness of processing benefits by the plan sponsor as well as the health plan and plan provider. Changes to dependent and beneficiary information often trigger a change in eligibility, and the dates of those changes are used to determine when coverage changes should begin and end. Requirements such as a Qualified Medical Child Support Order (QMCSO) and Qualified Domestic Relations Order (QDRO) mandate that employees provide benefits to dependents and beneficiaries, and accurate history must be maintained.

In 8.9, the Dependent/Beneficiary record is effective-dated so that customers can have more comprehensive reporting and tracking capabilities in this area. This capability enables our customers to track exactly what dependent and beneficiary information changed and when. Because changes to dependent and beneficiary information often affect eligibility and coverage for benefit plans, having such accurate history is often critical for compliance, as well as accurate historical record keeping on dependents and beneficiaries. This new functionality serves as an internal control to help corporations remain compliant with QMCSO, QDRO, and other mandated regulations.

The following information is effective-dated:

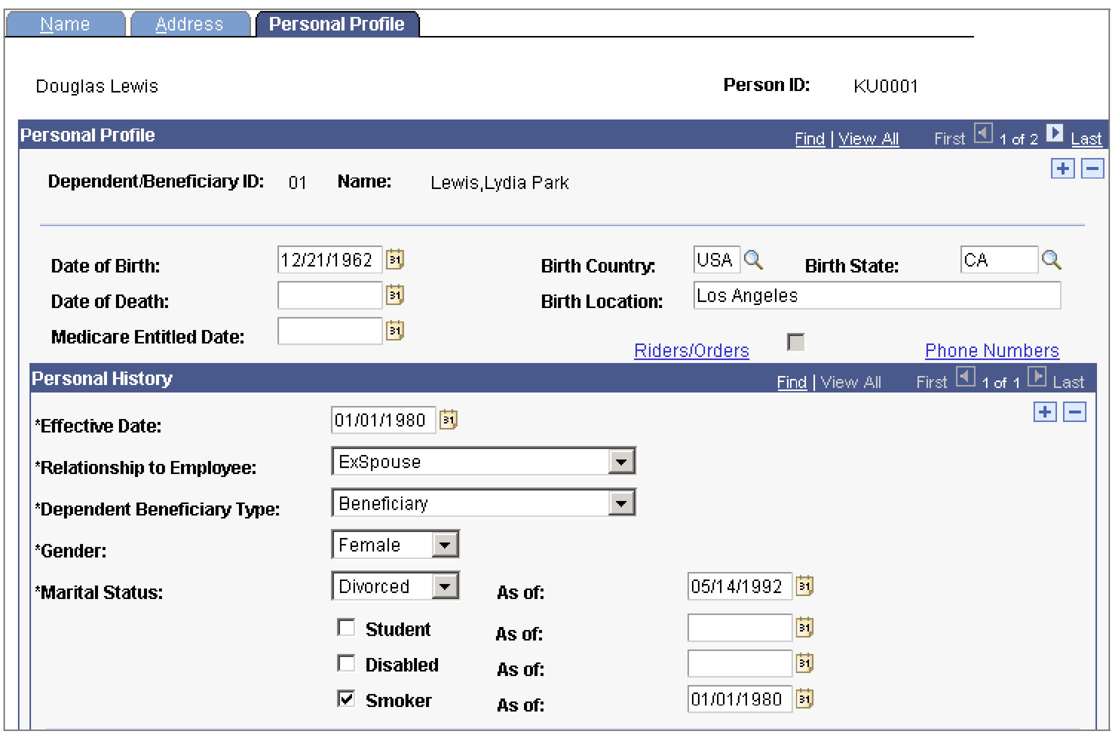
- Name
- Address
- Gender
- Disabled status
- Marital status
- Student status
- Smoker status
- Relationship

Use the Update Dependent/Beneficiary Information component to track and view this effective-dated dependent and beneficiary data:



Name page

Address page

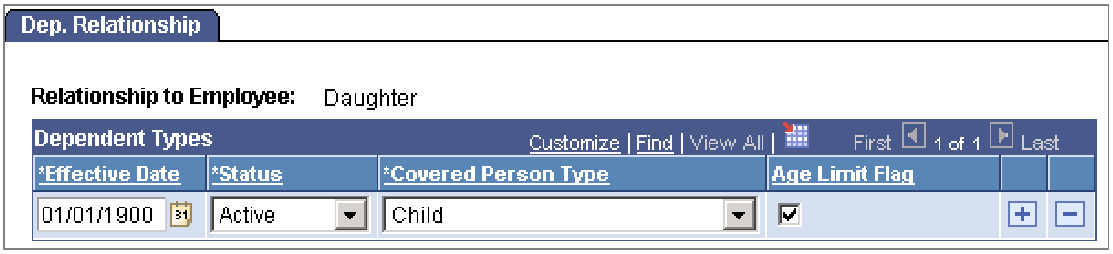


Personal Profile page

Covered Person Types

Dependent relationships are now linked to a covered person type.

Use the Dependent Relationships table in the Base Benefit business process to define allowable relationships. You can link more than one relationship to a covered person type. For example, the relationships of son, daughter, stepson, and stepdaughter can all be linked to the covered person type of child.



Dep. Relationship page

When the COBRA process for over-aged dependents is run, the system uses the ***Age Limit Flag*** to indicate which dependent roles should have the over-age rule applied.

Multiple Annual Benefits Base Rates

In many benefit plans, the benefit levels are determined based on a certain definition of the employee's salary. Most commonly, these are life insurance, accidental death and dismemberment, and disability plans (long term and short term). In these types of plans, the coverage amount can be a multiple of salary defined at a particular time.

As plans become increasingly complex in order to deal more effectively with the rising cost of healthcare, it is becoming increasingly common for different definitions of salary to be used for different benefit plans.

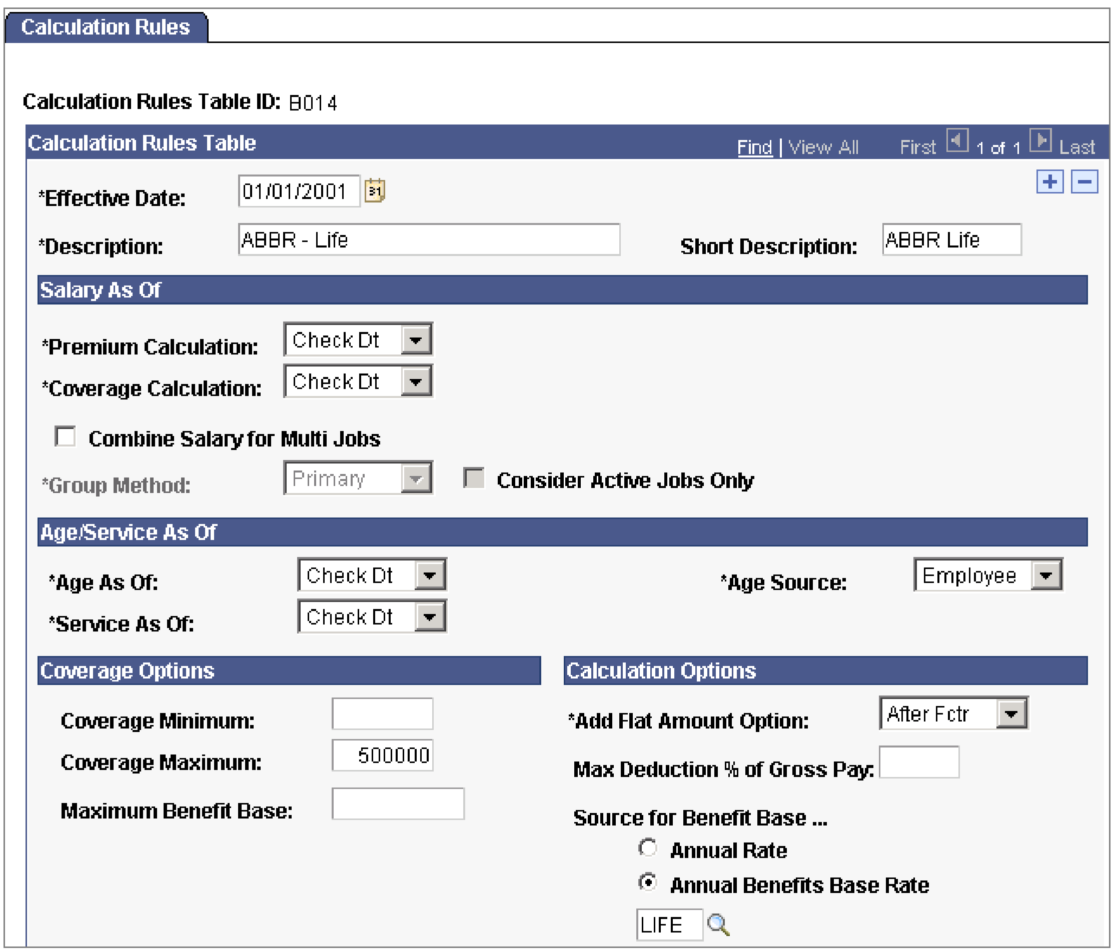
In 8.9, we provide the capability to define and use an unlimited number of annual benefit base rates to meet your needs. PeopleSoft provides new capabilities to support Multiple Annual Benefits Base rates (ABBRs) and, at the same time, to minimize the impact on your current processes. To do this, we provide the capabilities to:

- Provide for the entry and maintenance of multiple ABBRs.
- Enable the user to specify which ABBR to use for a given benefit plan by using the Calculation Rules table.
- Retain the current single ABBR on the job record as a default primary ABBR.

Use the ABBR Type table to define annual base benefits rates. ABBR types are effective-dated.

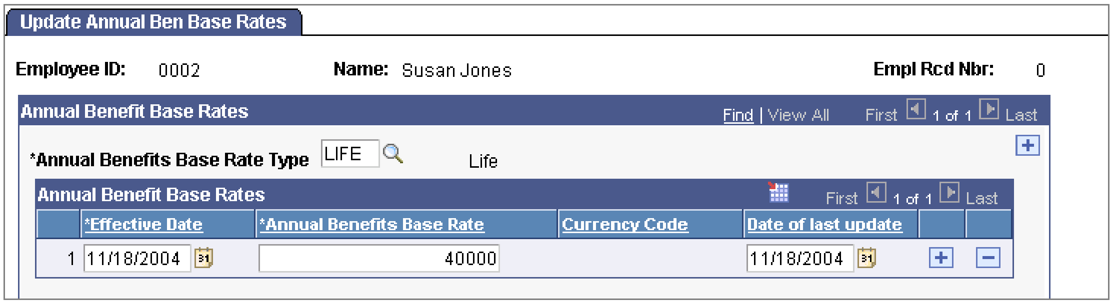
ABBR Type page

Use the Calculation Rules page to indicate which ABBR to use for a benefit plan:



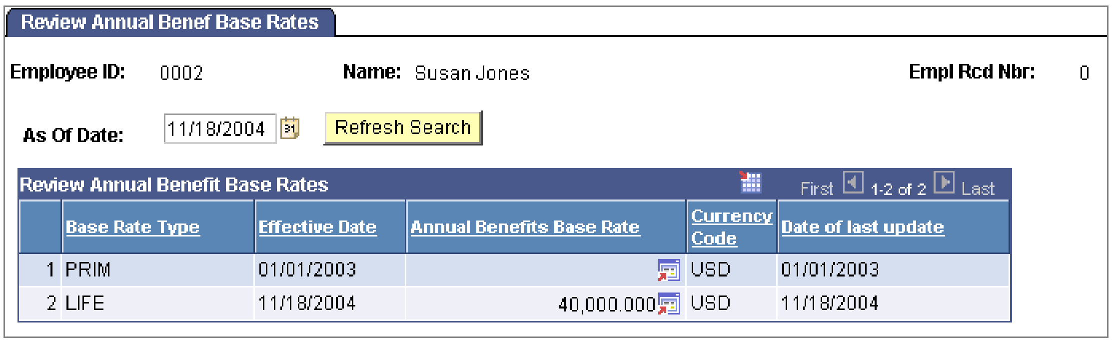
Calculation Rules page

Use the Update Annual Base Benefits Rates page to enter the multiple ABBRs for an employee. The first ABBR must be Primary.



Update Annual Ben Base Rates page

Use the Review Annual Benef Base Rates page to view an employee's rates.



Review Annual Benef Base Rates page

The ***PRIM*** (primary) base rate type is defined on the employee's job record.

ERISA Enhancements

United States cafeteria benefit programs (Section 125) permit only certain mid-year changes to occur to an employee's elections. Generally, employees can change their elections only when their life circumstances change. Examples include moving to a new area, birth of a child, adoption, and the death of a spouse or dependent.

The concept of consistency and the Consistency Rule have been a part of the regulations, subject to the interpretation of the IRS. At a general level, this means that the allowed changes must be in conformity with the event. Recently, the IRS clarified some of the rules, bringing the issue to the forefront again.

In this release, we provide the capability to permit an employee to make changes in levels of coverage that are consistent with the gain or loss of coverage eligibility. With this new security, companies can control employee access but still reap the cost savings by offering employee self-service benefits registration and maintenance year-round.

This new security means that changes in elections have to be consistent with what actually happened. For example:

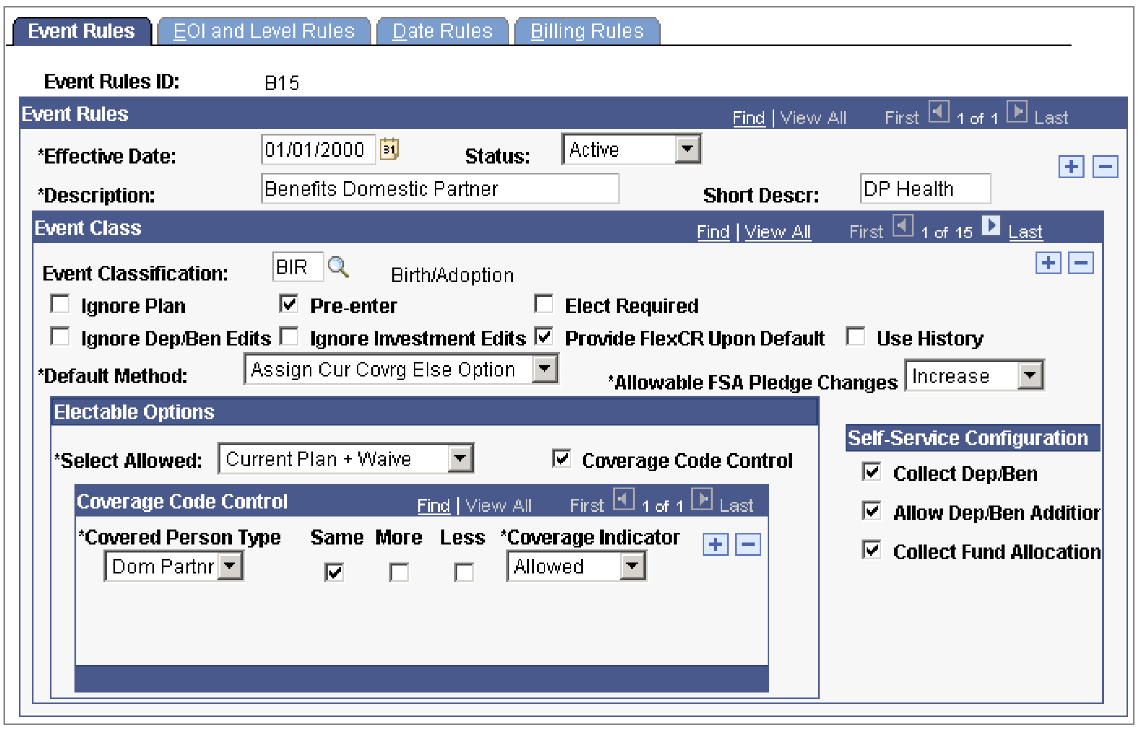
- To increase coverage, the event must be an increase in the number of eligible dependents, such as marriage, birth, adoption, or placement for adoption.

- Coverage decrease would only be allowed if there were a divorce, annulment, legal separation, death of spouse or dependent, or loss of dependent eligibility.
- Flexible spending account election changes must also be consistent with family member eligibility gains or losses.

Eligible Dependent Coverage Increase and Decrease

The Event Rules table has been enhanced for this release of Benefits Administration. Using the Electable Options group box, you can now define coverage controls. A new page, EOI and Level Rules (Evidence of Insurability and Level Rules), has been added to the BAS_EVENT_RULES component to support existing functionality.

This example shows the enhanced Event Rules component:



Event Rules page

Use the Select Allowed field to indicate which plan or plans an employee can select from among all eligible types of plans:

- ***All Plans:*** Employees can select from any option within the list of eligible options for the event.
- ***Current Plan:*** Employees can make changes to only the current plan.
- ***Current Plan + Waive:*** Employees can only change coverage levels (eligible options), including electing to waive within their currently enrolled benefit plan. However, if an employee’s current election is a waive of the plan type, any eligible option within any benefit plan can be selected.

For example, suppose that an employee has single coverage and gets married. The new spouse has health coverage through another employer and they decide that covering both individuals under the spouse’s benefit plan is a better choice. In this case, the employee is allowed to waive the current coverage because the spouse is adding the employee to the spouse's coverage.

- ***None:*** Prevents employees from making any changes to their elected option unless eligibility for their current option or plan has been lost, in which case, the system automatically overrides this setting and allows employees to select any option from eligible options for the event.

To access the Coverage Code Control group box, click the Coverage Code Control check box. Coverage control rules specify the criteria you use to select a valid coverage code for presentation to the employee for election. The rule specifies one set of criteria that is used when current coverage is in effect, and another set of criteria to be used when there is no current coverage.

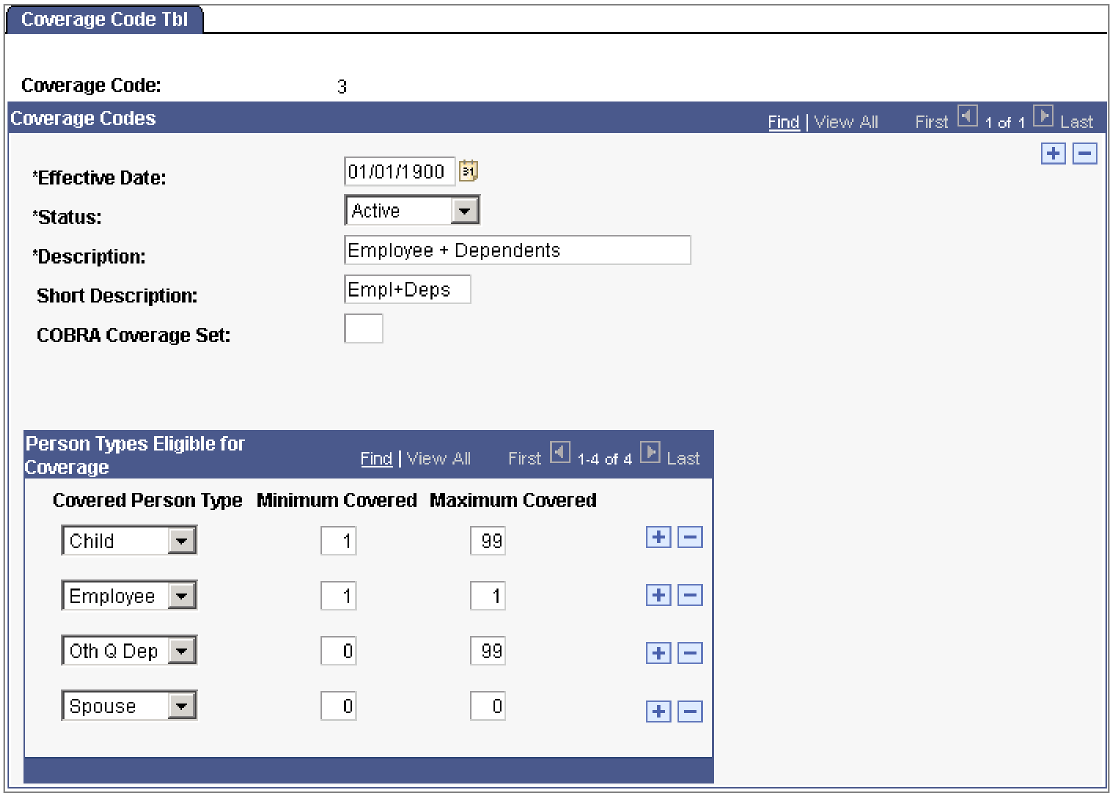
Using the Coverage Code Control group box, you can set the parameters for changing coverage by indicating the covered person type, how coverage can change (same, more, or less), and whether changes for the covered person type are allowed, not allowed, or required. Covered person types include:

- ***Child***
- ***Domestic partner***
- ***Employee***
- ***Nonqualifying dependent***
- ***Other qualifying dependent***
- ***Spouse***

An example of using the Same, More, and Less check boxes to define covered person type might be in the case of a divorce event class. In a divorce, it is possible to have more, the same, or less children enrolled depending on the situation. So, you would select all three check boxes for the ***Child*** person type option.

Continuing with the divorce event class example, you would add a row, and select the ***Spouse*** person type in the Coverage Person Type field and select the Less check box, since the spouse will no longer be covered. Finally, you would select the ***Employee*** person type and select the Same check box. The coverage code rule allows for all variations of a particular event class so it would be possible to allow more and less in the same event classification. In addition, the same, more or less applies if the employee is already enrolled in a plan, and the Coverage Indicator on the right applies if the employee is newly enrolled in the plan.

Use the Coverage Code table to define the minimum and maximum enrollments allowed for multiple covered person types.



Coverage Code Tbl page

Flexible Spending Account Pledge Changes

With the 8.9 release of Benefits Administration, you can define how to process FSA pledge changes. Use the Allowable FSA Pledge Changes field on the Event Rules page to indicate whether an increase or decrease to FSA pledges is allowed. The system processes the changes based on the event classification and the business process, and the employee is permitted to increase or decrease the FSA pledge. For example, if the event classification is birth, employees can increase, but not decrease their pledge.

Enhancements That Are Common to Multiple Applications

This section discusses new enhancements that are common to multiple applications. These enhancements are in the Enterprise Components area.

Enterprise Components

PeopleSoft continues to deliver enterprise-wide features that enhance your ownership experience and help you run your business more efficiently and profitably. With the release of PeopleSoft HRMS 8.9, PeopleSoft delivers:

- Active Analytics Framework.
- Interactive reports.
- Navigation Collections.
- Pagelet Wizard.
- PeopleSoft Data Transformer.
- PeopleSoft Setup Manager.
- Additional functionality in Directory Interface that enables you to specify distinguished name defaults.

Active Analytics Framework

PeopleSoft Active Analytics Framework is a suite of tools comprising a closed-loop decision-making system where specific business issues can be addressed. Business-intelligent applications or transactions can respond when conditions are met and specific actions are recommended; for example:

- Giving a priority service or a better discount for high-value customers.
- Send pertinent emails or notifications.
- Displaying alerts and warning messages.

New Functionality

PeopleSoft Active Analytics Framework provides components for setting up the analytic framework, which includes managing the data library, building policies, and managing actions. These components provide a way to define flexible business rules, called *policies*, which can be altered without modifying application code.

Data Library

The data library is a repository for information within the PeopleSoft Active Analytics Framework. Each element in the data library is exposed by way of a term, which is a pointer to a unit of data within the PeopleSoft system. This data may reside in a relational database, or it may be derived at runtime. PeopleSoft Active Analytics Framework includes components to define new terms in the data library and can automatically create terms for data elements in a component.

Managing Policies

Business analysts and other functional users define policies with an intuitive user interface. Functional users can create policies that use data elements of various forms and shapes residing in different sources such as the transactional environment, data warehouses, legacy systems, and so on. PeopleSoft Active Analytics Framework is triggered by the occurrence of events called *trigger points*, which in turn generate recommended actions based upon the evaluation of business policies. The combination of trigger point, conditions, and actions is known as a policy. Application developers and functional business analysts use a wizard-like interface to build, manage, and associate trigger points to policies.

You construct a policy by defining one or more conditions, specifying one or more actions, and associating them to a trigger point. A policy cannot be activated without defining at least one condition and action. You can reuse defined policies with multiple trigger points if the elements of the policy agree with the contexts of the trigger points. During runtime, policies are triggered by specific trigger points within application components, resulting in defined actions being taken.

Action Framework

An extensible framework supports the definition and execution of consequent actions. PeopleSoft delivers a built-in action type for displaying alerts to the user. In addition, application developers can create customized action types within product lines to accommodate their functional needs.

Interactive Reports

Interactive reports utilize PeopleSoft Business Analysis Modeler, a calculation and analysis tool use by various PeopleSoft applications, to calculate and present multi-dimensional data to the user.

New Functionality

Interactive reports provide users a multi-dimensional and interactive view of their enterprise data. Users can pivot charts and tables of data in a way that is most relevant to their role in the organization, then print or download that data to a spreadsheet format. Interactive reports also provide features for users to enter what-if assumptions, recalculate and view or print the results based on those varying assumptions.

Interactive reports are based on the PeopleSoft Business Analysis Modeler technology, offering a method of embedding analytic functionality in all PeopleSoft applications.

The Interactive Report Framework feature includes:

- Pages to define the interactive report environment.

  Pages include Define Reports, Define Servers, Define ODBC Connections, Map Queries and Validate Environment. Users can access them from the Enterprise Components, Interactive Report Definitions folders.

- The PeopleSoft Business Analysis Modeler model file, which contains the data structure and calculation rules that PeopleSoft queries use to select the appropriate data for the report.

- The PeopleSoft Business Analysis Modeler PageView file, which contains the report layout.

- A page to capture the capture query prompt values and launch the report

Application developers generate the model, PageViews, and PeopleSoft queries used with Interactive Reports.

Navigation Collections

PeopleSoft delivers a set of Navigation Collection portal utilities including:

- The Navigation Collections component.

- Navigation Collection system and registry defaults.

- Portal utility batch processes.

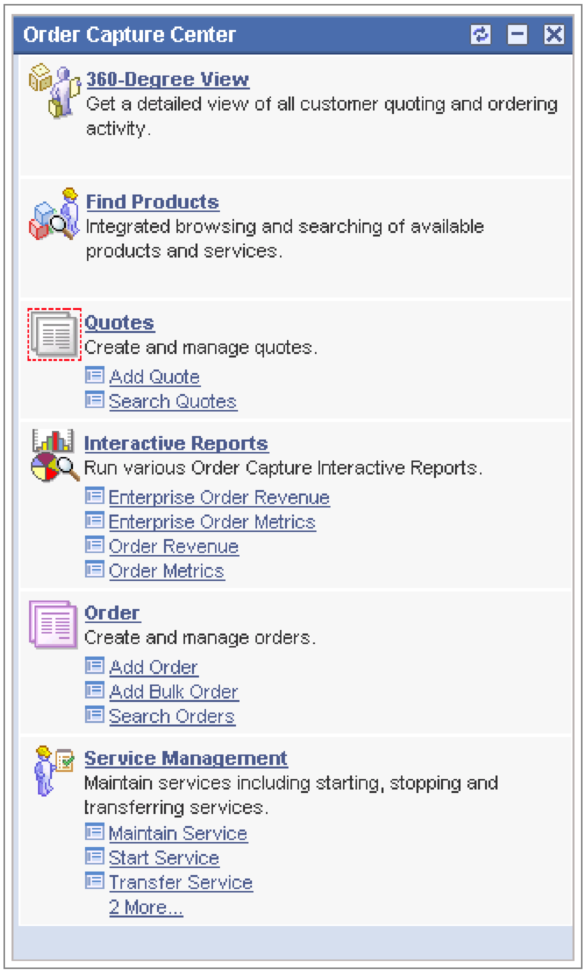
Navigation Collections enable you to create custom navigation pages for specific user roles, departments, or logical groupings of work. Instead of having users traverse through a list of menu items to locate the content that they are looking for, you can simply create collections of useful links tailored to their needs. You can deploy these groupings of links to portal content to different users or groups of users, providing navigation that is tailored to a specific role or business process.

Navigation Collection Publications

Some common examples of custom navigation pages that you can create include a help desk center, a self-service center, or the following Support Center:

Support Center custom navigation page

If you have PeopleSoft Enterprise Portal or a portal pack installed, you can use these same Navigation Collections to create navigation pagelets for your homepages.



Order Capture Center navigation pagelet

Navigation Collections Component

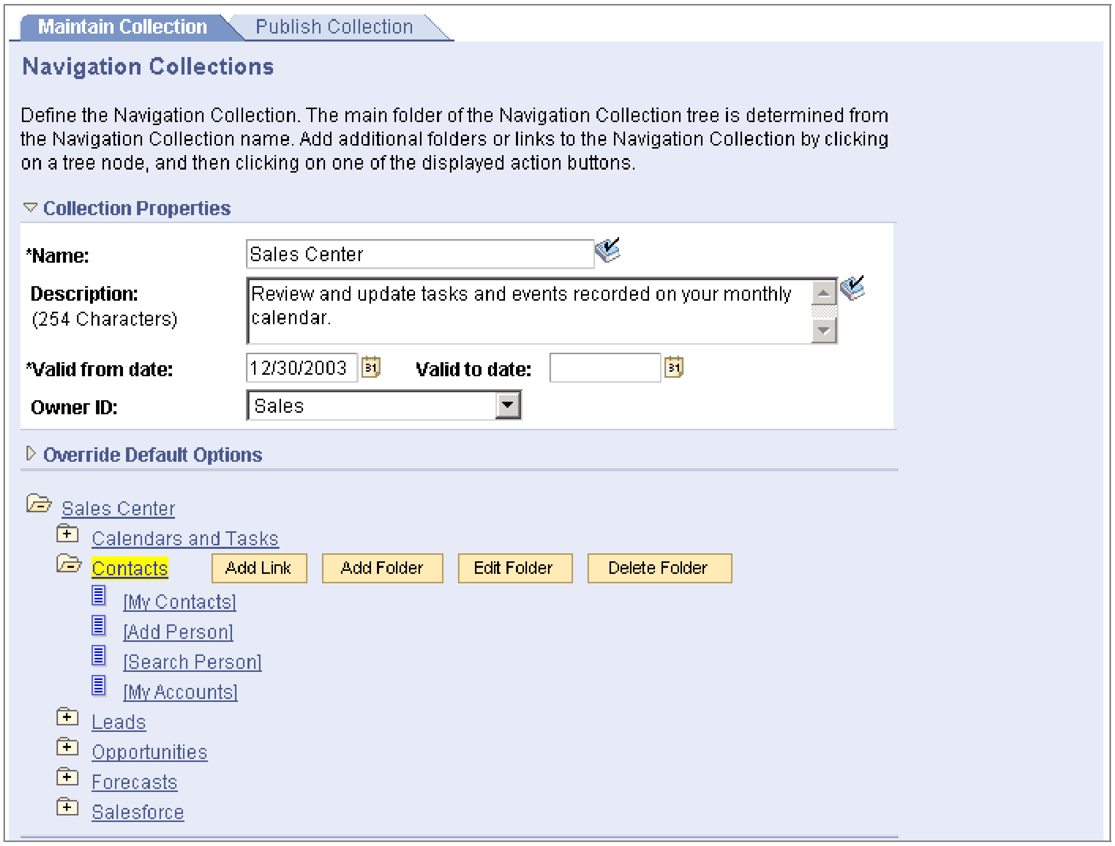
To help you understand Navigation Collections, consider the following analogy. An operating system contains a repository called a file system where all information about that operating system and its user files are stored. This file system is a rigid structure that contains information in different segments of the structure. Each piece of information is uniquely tagged and identified. The PeopleTools portal registry parallels this operating system's file system.

In a Microsoft Windows operating system, there are a number of ways to access a piece of information in the file system. For example, when you use Microsoft Windows, you can use the File Explorer to navigate through a visual representation of the rigid file system. You can also access this same file using a Microsoft Windows shortcut, which provides a method of file access that is an alternative to the rigid file system. Likewise, the links in Navigation Collections provide an alternate method of accessing content in the portal registry. A link in a Navigation Collection is a pointer to a content reference or folder reference in the portal registry.

Navigation Collections enable you to distribute the creation and maintenance of collections to subject matter experts in your organization, such as functional administrators and business analysts. These people know your business processes and roles and therefore are good candidates to be the creators of these collections.

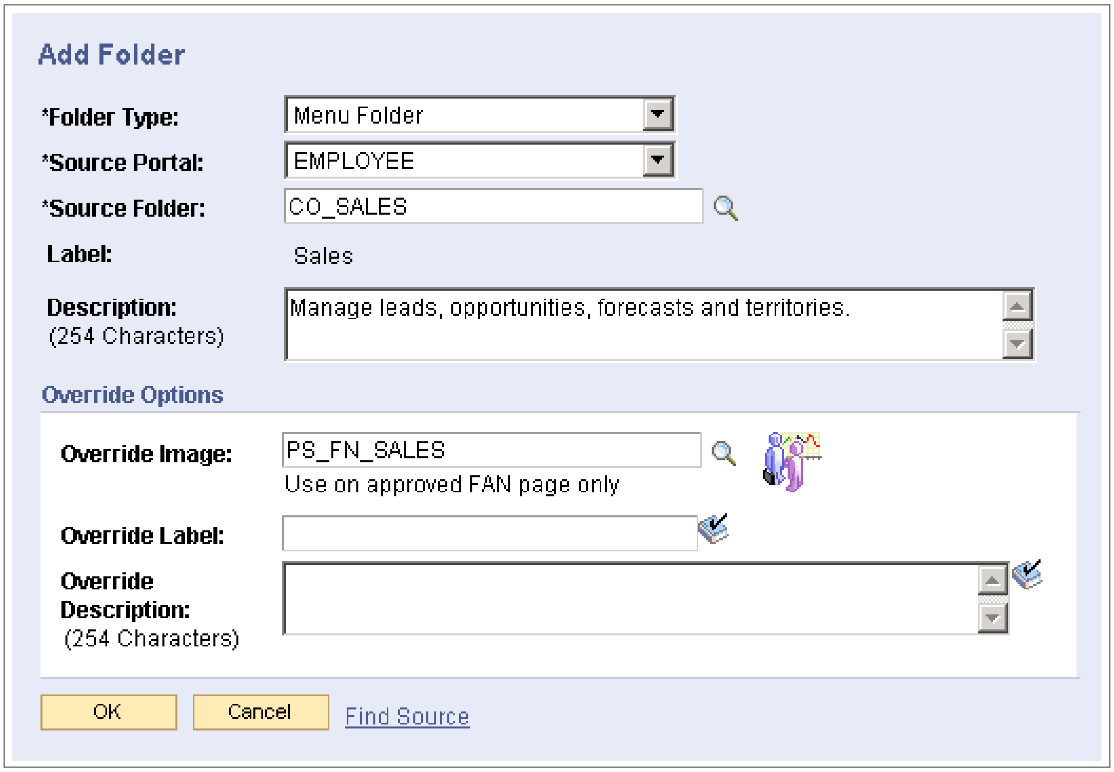
New Functionality

We created a simple user interface to ensure easy maintenance of Navigation Collections by subject matter experts. The custom navigation pages delivered with PeopleSoft applications have been built using this Navigation Collections component.



Navigation Collections page

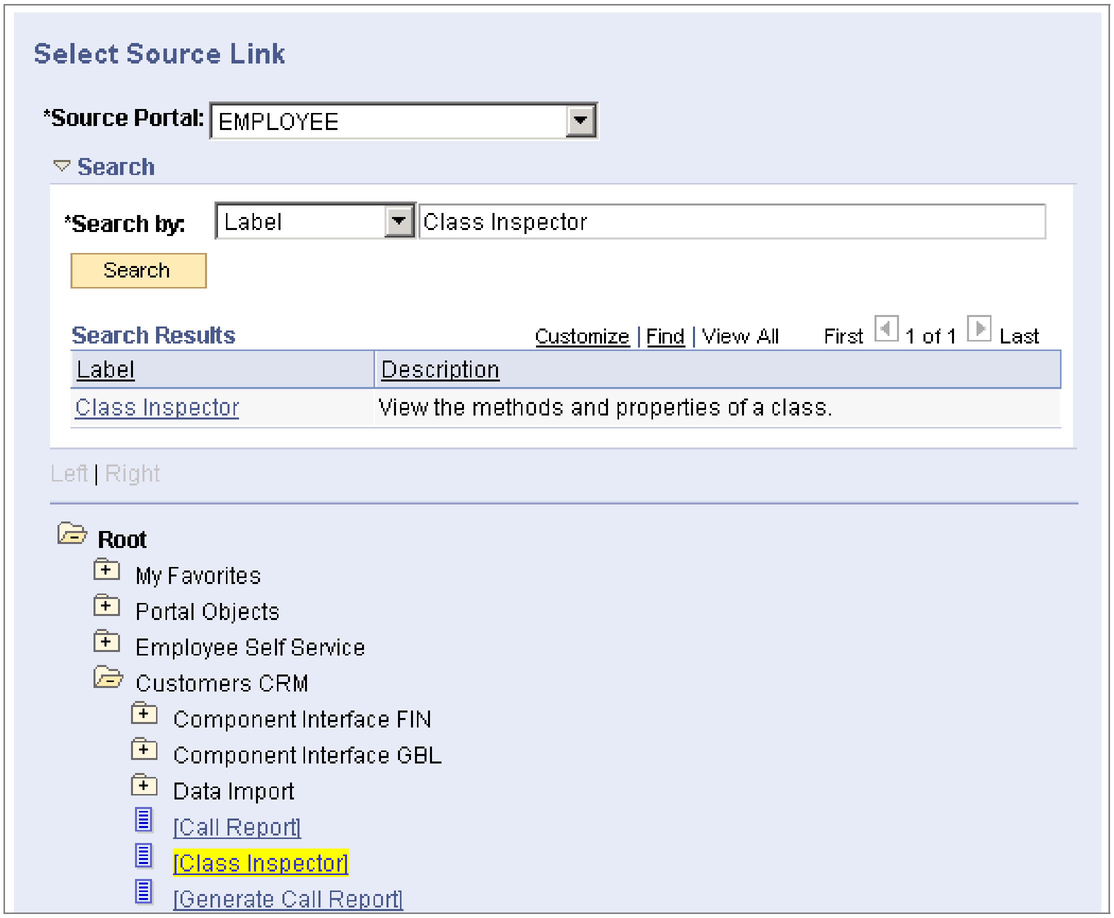
The Navigation Collection feature enables you to build collections of links to content references, and menu-based or user-defined folders. You can access the Add Folder page to select a menu-based folder for inclusion in your Navigation Collection.



Add Folder page

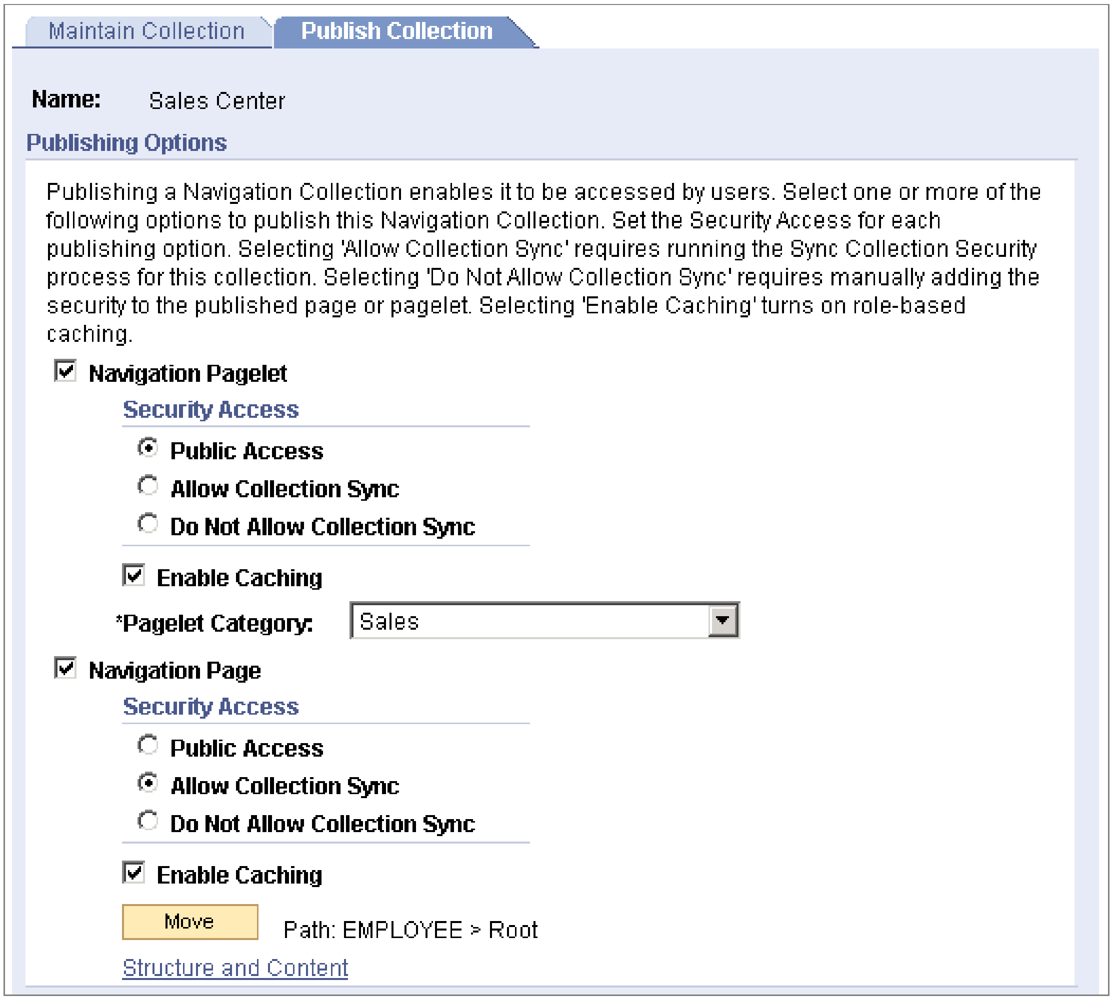
You can also use this page to associate an image to display along with the folder reference on the published Navigation Collection. Likewise, you can select images to display along with content references.

We include pages, like the following, that provide a search tool and graphical display of a selected portal registry that you can use to locate the content or folder reference that you want to add to the Navigation Collection:



Select Source Link page

Once you have created a Navigation Collection, you publish the collection as a custom navigation page. If you have PeopleSoft Enterprise Portal or a portal pack installed, you also have the option to publish the collection as a navigation pagelet for use on a user home page. When you publish a Navigation Collection, you can specify security access and display caching options.



Publish Collection page

Selecting the Allow Collection Sync (allow collection synchronization) option makes the publication eligible for processing by the Sync Collection Security (synchronize collection security) Application Engine process (EOPP_SCSYNC), which applies content reference and folder security defined in the portal registry to the published navigation page or pagelet content reference.

To facilitate the creation and maintenance of Navigation Collection publications, PeopleSoft provides sets of system- and registry-level defaults for various aspects of the collections. Following are some of these default options:

- Choose to display breadcrumbs on navigation pages.
- Select the style sheet to use to generate publications.
- Choose to display images on publications, as well as select which images display.
- Specify the maximum number of links and columns to display on publications.
- Enable drill-down display caching for publications.

These defaults enable you to set these values once at the system-level, and all Navigation Collections that you create inherit these default values. You can override default values set at the system-level at the registry-level.

In addition, overriding values for some of these system and registry defaults can be specified at the source reference definition and individual Navigation Collection definition.

PeopleSoft created the following processes to facilitate your implementation of Navigation Collection publications:

- Sync Collection Security Application Engine process (EOPP_SCSYNC).

  This process updates security for Navigation Collection pages and pagelets published with the Allow Collection Sync option selected by adding permission lists defined for content references and folders in the Navigation Collection to the published navigation page or pagelet permissions.

- Delete Empty Folders Application Engine process (EOPP_FD_DEL).

  Users with proper permissions can use this process to delete portal registry folder references that do not contain child folders or content. The process neither deletes empty Navigation Collection folder placeholders, nor the My Favorites folder. This process is useful for deleting content references during an upgrade or implementation when you need to remove out-of-date navigation and replace it with the current delivered navigation.

- Clean Portal Project Application Engine process (EOPP_CPPROJ).

  Run as a part of an upgrade or implementation, this process removes unnecessary and potentially harmful data from a content provider portal project definition before you copy it to the PeopleSoft Enterprise Portal. The process removes common objects from the content provider portal project that, because they are common, also exist in the PeopleSoft Enterprise Portal.

Pagelet Wizard

Pagelets provide quick "at-a-glance" views of information that can reside in a variety of sources. In the past, creating pagelets required that organizations use a development tool such as PeopleSoft Application Designer and have some deep knowledge of web technology.

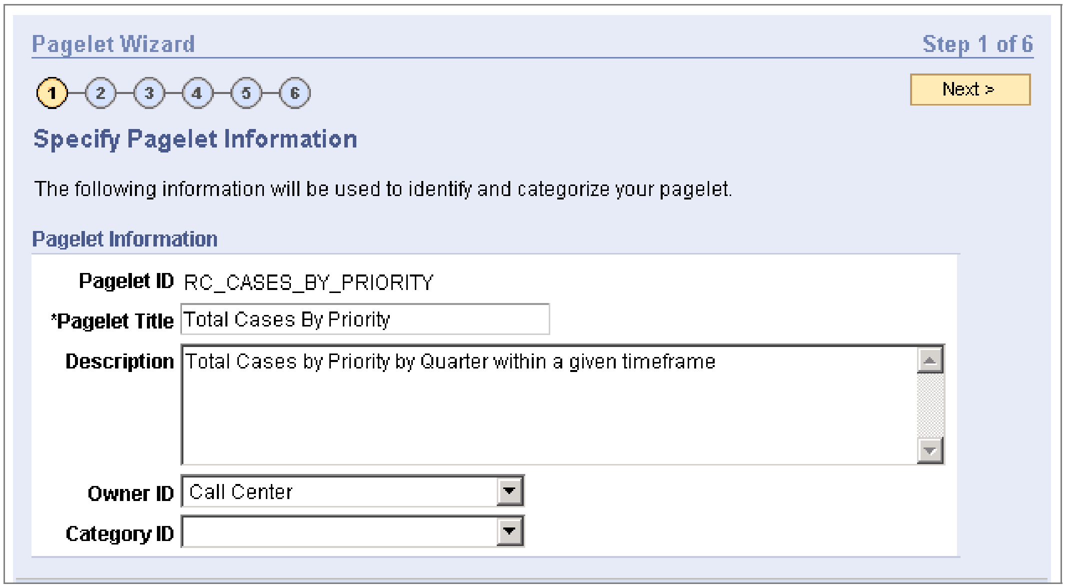
Pagelet Wizard simplifies this process by enabling you to create pagelets quickly and easily via the web. This tool is powerful in that it can access a variety of data sources and enables deep customization of the way in which data from these data sources is presented – with no coding required. Pagelet Wizard makes pagelet creation fast and easy, enabling more effective delivery of content to users.

New Functionality

Pagelet Wizard provides a user-friendly, browser-based graphical user interface (GUI) that guides you through pagelet creation and publication. The Pagelet Wizard GUI displays a numbered path that walks you through the following steps:

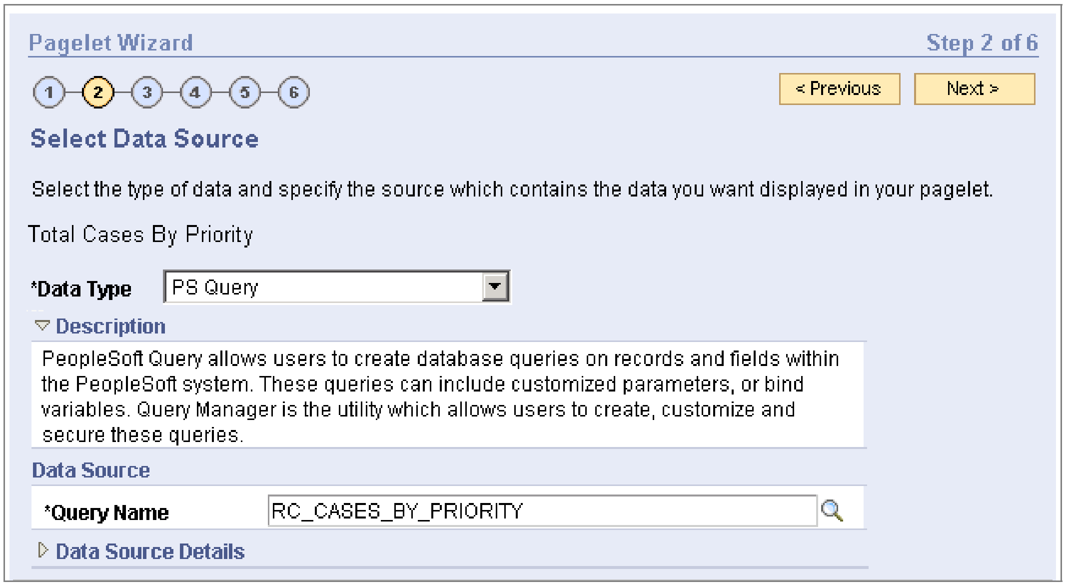
Note. Once you've completed a step, Pagelet Wizard automatically takes you to the next appropriate step.

1. Specify pagelet information.



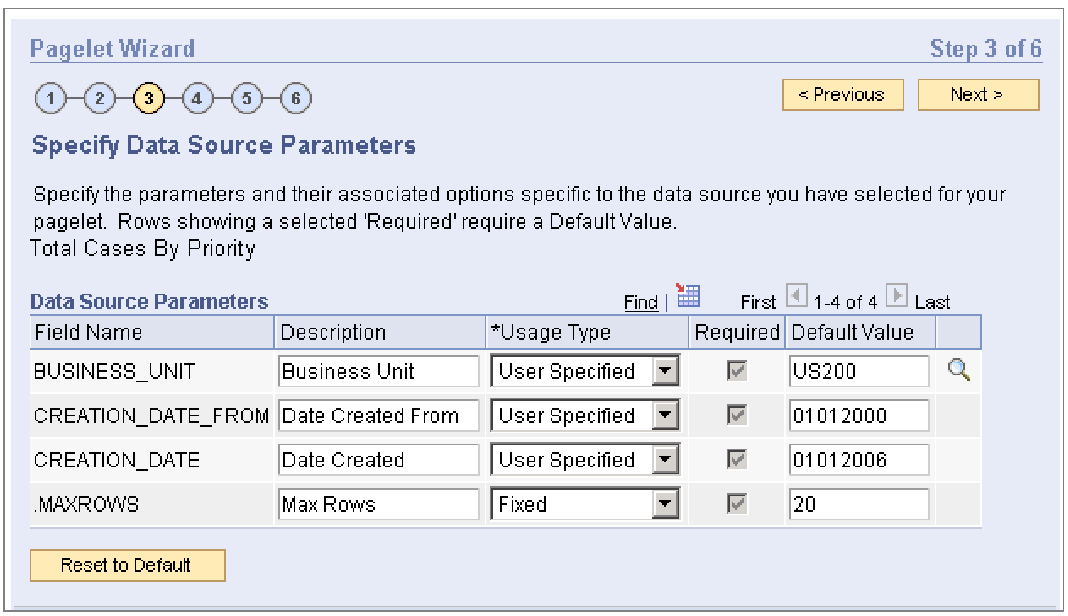
Enter description and summary information for a pagelet, including a pagelet owner and category.

2. Select a data source.



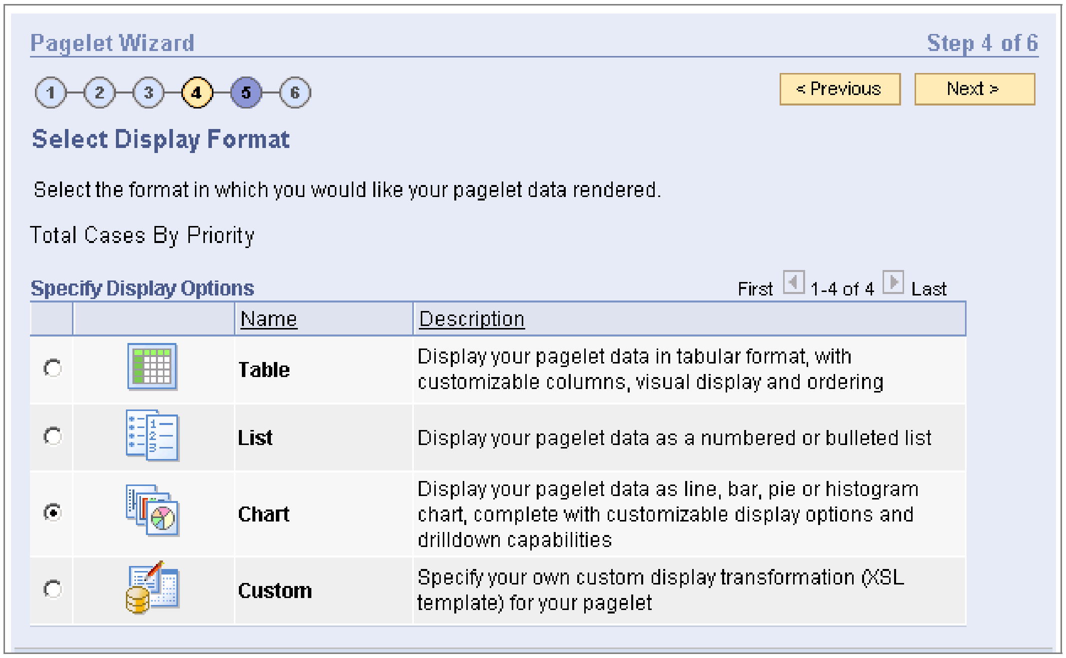
Select from the following data sources: PS Query, HTML, search records, and Navigation Collections.

3. Specify data source parameters.



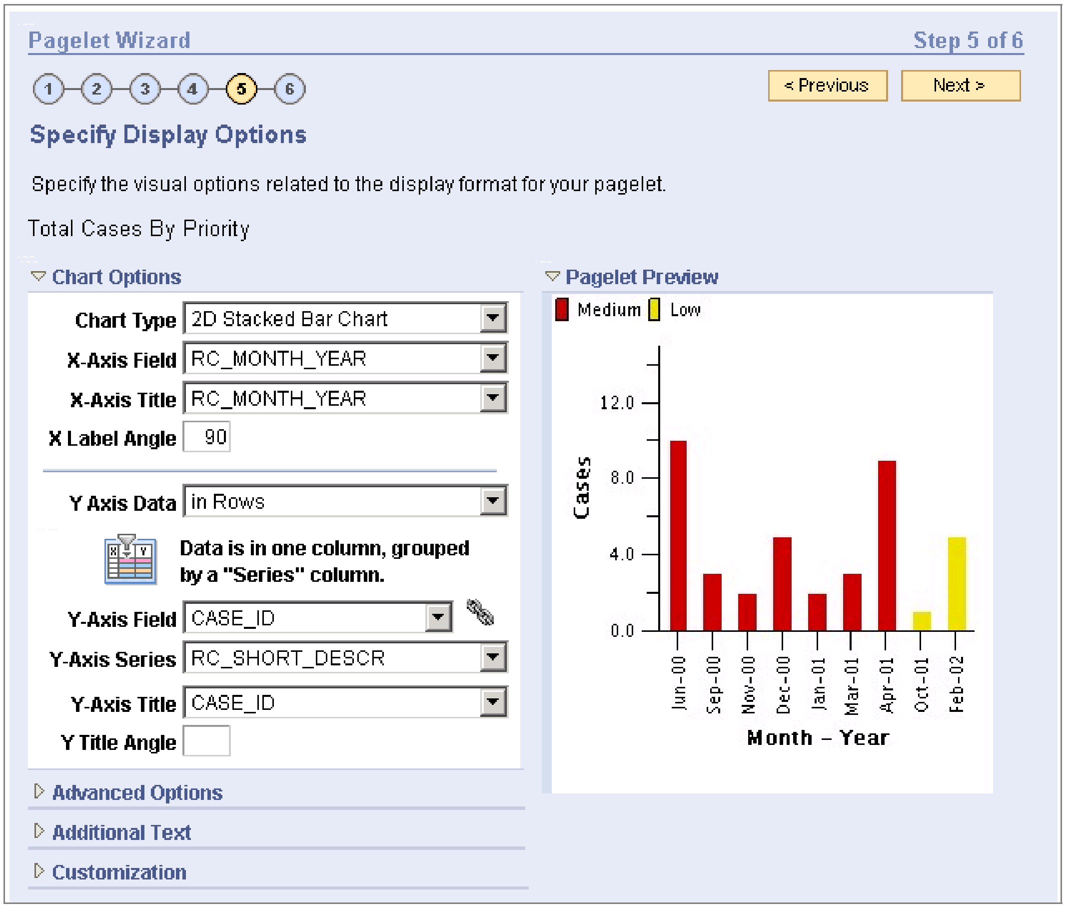
Enter user-specified and fixed data source parameter values. You can also enter system variable values such as *%UserId,* which the system substitutes at runtime with the actual value represented by the variable.

4. Select a display format.



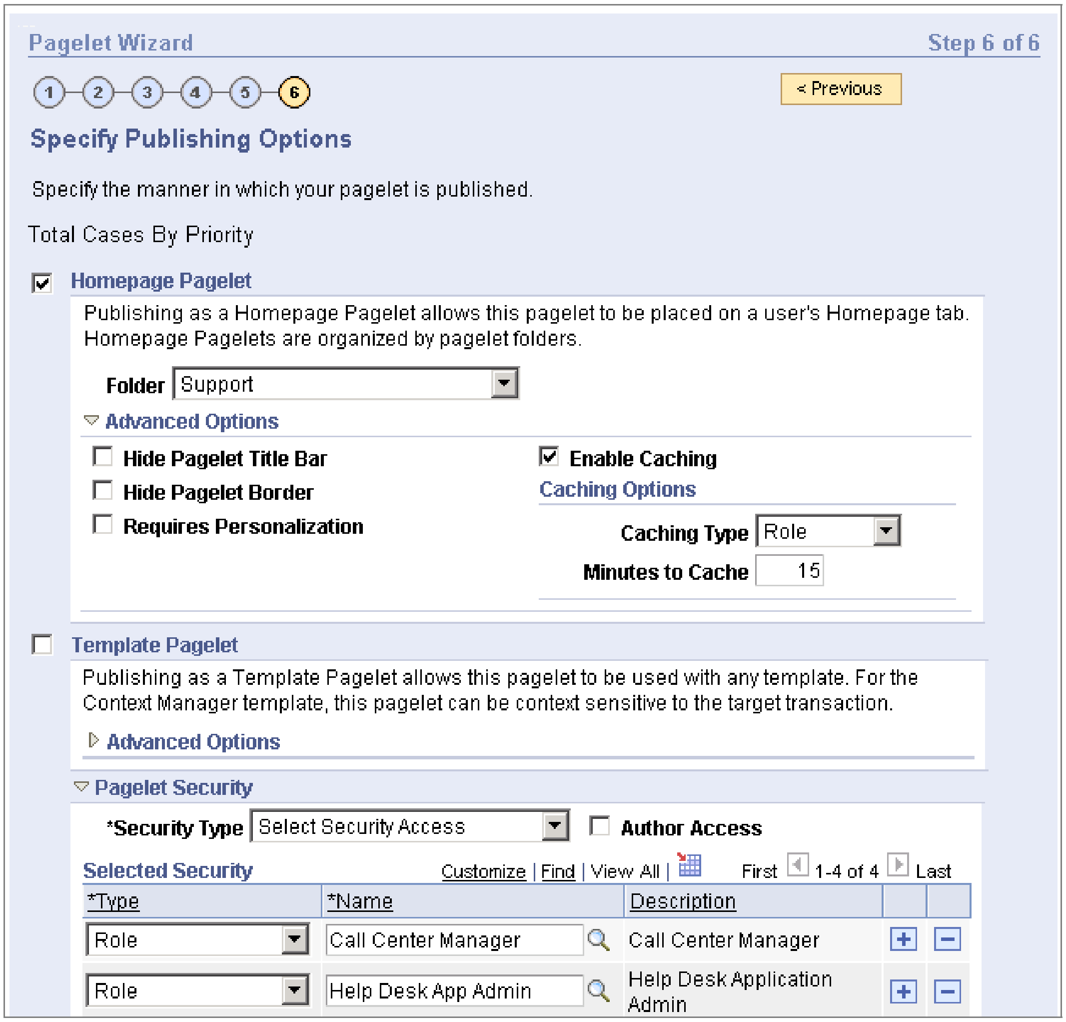
Select from the following display formats: table, list, chart, menu, search list, passthru, and custom XSL.

5. Specify display options.



Enter display options specific to the format you have selected for your pagelet, including headers and footers, and opening and closing text.

6. Specify publishing options.

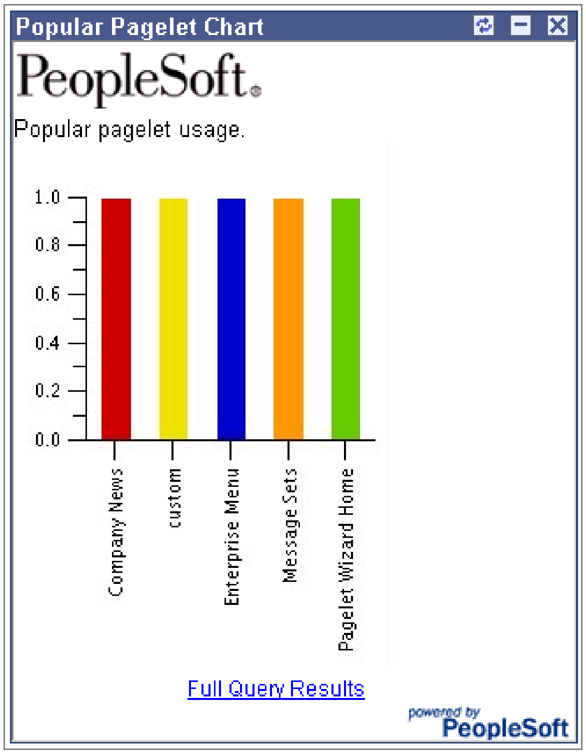


Choose to publish a homepage pagelet, template pagelet, or both. When publishing your pagelet, you can also specify pagelet security and caching options.

The option to use Pagelet Wizard pagelets published as homepage pagelets is available if you have licensed PeopleSoft Enterprise Portal or a Portal Pack.

The following examples illustrate the variety of pagelets that you can create using Pagelet Wizard.

This pagelet was created using the query data source and chart display format. The pagelet also employs Pagelet Wizard display options to include header and footer images, opening text, and a link to the query's full results.

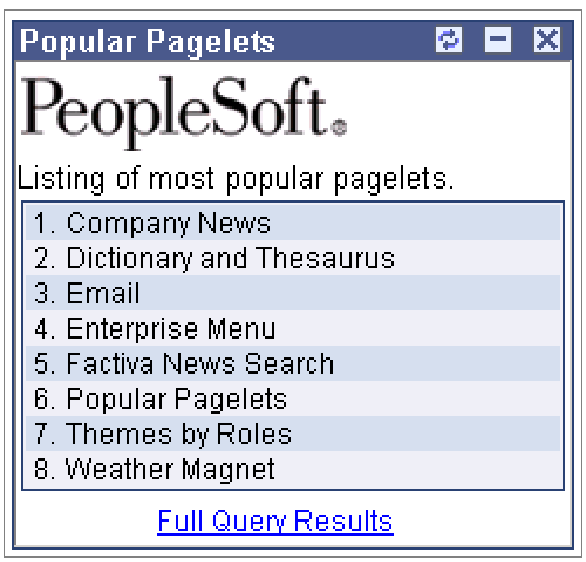


Popular Pagelet Chart pagelet

This pagelet was created using the Navigation Collections data source and menu display format:

Pagelet Wizard Home pagelet

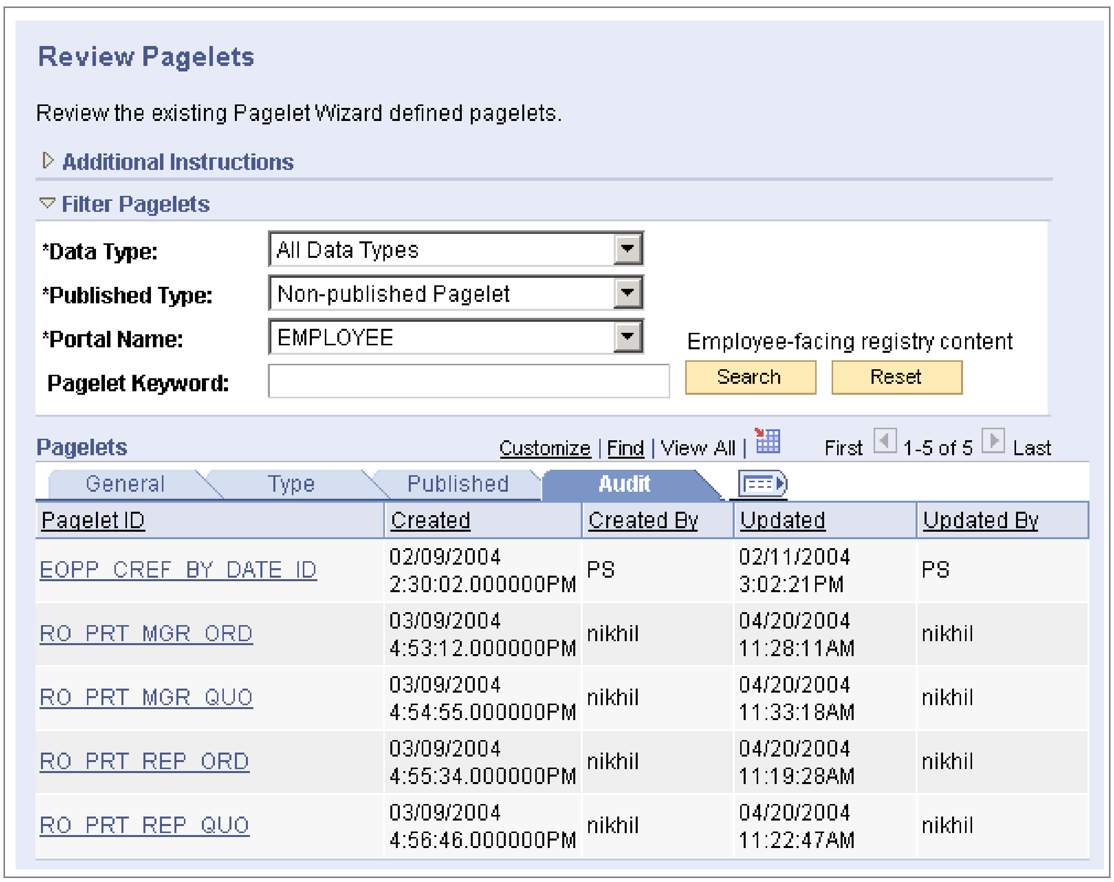
This pagelet was created using the query data source and list display format:



Popular Pagelets pagelet

Pagelet Wizard is delivered with administrative tools that enable you to perform the following tasks for your pagelets:

- Delete pagelets.
- Copy pagelets.
- Generate pagelet import and export Data Mover scripts.
- Generate pagelet setup data import and export Data Mover scripts.
- Publish a pagelet from a source portal to multiple target portals.
- Publish multiple pagelets from a source portal to a selected target portal.
- Review pagelet information.



Use the Review Pagelets component to track details about your pagelets, including data type, display format, publication status, and modification history.

PeopleSoft Data Transformer

This section highlights the changes that have been added to PeopleSoft Data Transformer.

New Functionality

The Run Summary feature enables you to view information related to the status of a particular PeopleSoft Data Transformer extract, transform, and load process. Although the Process Monitor also provides information regarding a process run, the Run Summary feature offers a more granular view of the individual subprocesses, such as chunks, that are not exposed in the Process Monitor.

For example, a single map containing chunks or a group can spawn numerous jobs. If you use the Process Monitor to view these jobs, you see that the numerous jobs associated with a single map are mixed in with all the other jobs that are currently running. Depending on the number of jobs running, this can create difficulty in viewing only the jobs associated with a particular extract, transform, and load utility activity.

However, using the Run Summary feature you can view all of the jobs that were spawned for the run control associated with a particular utility activity. The Run Summary feature is especially useful when executing parallel processes associated with multiple maps. Using the Run Summary feature, you can to associate a process instance to each chunk as it executes.

The Run Summary feature enables you to see:

- Which subprocesses are involved within a particular utility activity.
- When a particular subprocess (chunk or map) begins.
- When a particular subprocess (chunk or map) completes.
- Which subprocesses didn’t complete successfully.
- Which process instance is associated with a particular chunk or map.

Setup Manager

Implementing enterprise application software can be a costly and time-consuming process. It requires excellent planning, skilled resources, and sound analysis. PeopleSoft delivers the PeopleSoft Setup Manager to assist with the implementation effort.

Determining what and how application features must be configured to support your implementation is a daunting task. PeopleSoft Setup Manager brings together the list of tasks required to support your implementation and the relevant documentation by providing links to PeopleBook documentation.

PeopleSoft Setup Manager reduces the manual effort of identifying the application setup required to support your implementation. Ease your implementation effort through the use of setup task lists that identify the setup components that must be configured with your application.

New Functionality

Using the Manage Setup Tasks component, review and manage your Setup Task List, which represents setup tasks required to support the product that you are implementing. Setup tasks are sequenced in the order in which they must be completed. For each setup task in the setup task list, there is a related navigation path that shows where a setup component is located and a direct link to that setup component. For each task, a suggested load method is identified and links to PeopleBook documentation are available so that you can view documentation for that setup component.

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